LIFELONG LEARNING POLICY IN ENGLAND AND JAPAN:

A COMPARATIVE ANALYSIS

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ABSTRACT

In both England and Japan, 'lifelong learning' has been positioned as central to educational reform. However, their lifelong learning policies are different: skills development which leading to economic growth is emphasised in England, whereas community building aiming at social reconstruction is prioritised in Japan. This study asks why the policies are different and how these differences have developed.

English and Japanese lifelong learning policies have developed within both domestic and global contexts. Domestically, contrasting historical problems and moments of major change and political and social processes have resulted in different lifelong learning policies in the two countries. Globally, in the 1990s, the idea of lifelong learning has become a discursive norm, and numerous benefits for lifelong learning are claimed. Similar debates can be identified in both England and Japan, but it is the legitimacy and adaptability of lifelong learning which permit different interpretations of the idea.

This study is structured as follows. Chapter One frames the study, outlining the scope, the research questions, the main argument and the structure of the thesis. Chapter Two provides an historical account of the international development of lifelong learning policy and identifies the current major characteristics of the international discourse on lifelong learning. Chapters Three and Four analyse respectively the formulation of the English and the Japanese lifelong learning policies. As the policies moved into practice, they were reshaped: these processes are analysed in Chapters Five and Six. Chapter Seven revisits the international discourse on lifelong learning and examines its relationship with local lifelong learning policies. Chapter Eight reflects on the study.

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LIST OF ABBREVIATIONS

BAICE: British Association of International and Comparative Education
CBI: Confederation of British Industry
CERI: Centre for Educational Research Institute, OECD
DfEE: Department for Education and Employment
DfES: Department for Education and Skills
ESRC: Economic and Social Research Council
EU: European Union
FEDA: Further Education Development Agency
FEFC: Further Education Funding Council
GCSE: General Certificate of Secondary Education
GNVQ : General National Vocational Qualification
HEFCE: Higher Education Funding Council
ICT: Information and Communication Technology
IiP: Investors in People
LSC: Learning and Skills Council
MESSC: Ministry of Education, Science, Sports and Culture
MEXT: Ministry of Education, Culture, Sports, Science and Technology
MOE: Ministry of Education
MSC: Manpower Services Commission
NACETT: National Advisory Council for Education and Training Targets
NAGCELL: National Advisory Group for Continuing Education and Lifelong Learning
NATFHE: National Association of Teachers in Further and Higher Education
NCVQ: National Council for Vocational Qualifications
NIACE: National Institute of Adult Continuing Education
NIER: National Institute for Educational Policy Research (Before January 2001, it was National Institute for Educational Research)
NPO: Non-profit Organisation
NSTF: National Skills Task Force
NVQ: National Vocational Qualification
OECD: Organization for Economic Co-operation and Development
PSA: Public Service Agreement
QCA: Qualification and Curriculum Authority
SCUTREA: Standing Conference on University Teaching and Research in the Education of Adults
SEU: Social Exclusion Unit
SSC: Sector Skills Councils
SSDA: Sector Skills Development Agency
TEC: Training and Enterprise Council
TUC: Trade Union Congress
UfI: University for Industry
UIE: UNESCO Institute for Education
UN: United Nations
UNESCO: United Nations Educational, Scientific and Cultural Organization
UNEVOC: UNESCO International Centre for Technical and Vocational Education and Training

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CHAPTER ONE INTRODUCTION

Lifelong learning has been a part of the international educational policy debate for many years. Particularly in the 1990s, lifelong learning achieved, as Singh suggests, a remarkable "current status in educational policies".[1] Lifelong learning has become, in Field's words, "the new educational reality".[2] Expressions such as "a learning society",[3] "a lifelong learning system"[4] and "a learning revolution"[5] are commonplace.

However, the term 'lifelong learning' and its derivatives – 'a learning society' or 'a lifelong learning system' – can mean different things, and the approaches to the policy development of lifelong learning vary. These variations can be identified in England and Japan. Although both the UK[a] and the Japanese governments have positioned lifelong learning as central to ongoing educational reform, their lifelong learning policies are different.

This study aims to explain why the policies are different and how these differences have developed.

A critical interpretation of the political, historical and cultural framing of the differences in England and Japan as well as of the worldwide diffusion of lifelong learning is offered. Such a comparative analysis on lifelong learning which incorporates both domestic and global perspectives is less often seen in the existing literature. This study will contribute to the deeper understanding of lifelong learning.

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[a] This study concerns England only, but in referring to a government, the phrase 'the UK government' is used unless the literature specifies 'the British government' or 'Britain'.

In this chapter the frame of the study is set out by clarifying the scope of the term 'lifelong learning', identifying the differences between English and Japanese lifelong learning policies, discussing the phenomenon of the diffusion of lifelong learning from a comparative perspective, and presenting the main argument and the research questions.

To take the first of these, the meaning of the term 'lifelong learning' must be clarified. Both in England and Japan, the term and its derivatives have been frequently invoked by politicians, administrators, academics and practitioners. However, they are not always necessarily talking about the same thing. Moreover, whilst lifelong learning has been treated as a central education reform policy, it is also in some senses an ideology. Lifelong learning is therefore, at least, two-dimensional: an ideological idea as well as a substantial policy.

At the ideological level, 'lifelong learning' can be a vision of society as a whole, i.e. 'a learning society' and 'a lifelong learning system', based on the availability of many forms of learning, as both the UK and the Japanese governments have claimed. At this level, there appears to be a lot of similarity between the two countries.

But as a public policy, particular aspects of lifelong learning (such as family education or learning at the workplace) are likely to have a different emphasis in each country. This is because of different domestic economic, political, historical, social and cultural circumstances. As a consequence of this, each government may call this specific and prioritised agenda their lifelong learning 'policy'. At this level of policy, there are more apparent contrasts between the two countries.

The distinction between the two dimensions of lifelong learning is important in exploring why and how lifelong learning policies differ in England and Japan.[a] By way of further clarification of the policy dimension, it is however necessary at the outset to set out its administrative structures in a little more detail.

Policy tends to be formulated by multiple administration agencies, but this study focuses on lifelong learning policy as controlled in each case by the national education administration agency: i.e. in England, the Department for Education and Skills (DfES)[b] and in Japan, the Ministry of Education, Sports, Culture, Science and Technology (MEXT).[c]

However, the identification with any precision of the policies developed by such an agency is not straightforward. In the English case, due to the close link between 'education' and 'employment', the administrative units relevant to these areas have sometimes merged: i.e. the former Department for Education and Employment (DfEE) created in 1995. In the Japanese case, the administrative units are more distinct since the administration of 'education' and 'employment' has always been separated.

Also, in both countries, responsibility for the promotion of and policy-making for lifelong learning has spread horizontally across Departments and Ministries. In England, in particular, the Labour government's cross-cutting approach[d] has led to joint working

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[a] This theme is explored in Chapter Seven.
[b] In April 2001, the Department for Education and Employment (DfEE) became DfES. 'Employment' was transferred to the Department for Work and Pensions.
[c] In February 2001, 'Technology' was added to the former Ministry of Education, Science, Sports and Culture (MESSC), which became MEXT.
[d] The Cabinet Office refers to 'a cross-cutting approach' as "any policy or service where there is or should be joint working between Government departments and agencies".

projects between Departments,[6] aiming to loosen the boundaries between them: e.g. the current skill strategy is cross-departmental. In Japan, the Cabinet Office, the Ministry of Economy, Trade and Industry,[a] the Ministry of Public Management, Home Affairs, Posts and Telecommunications[b] and the Ministry of Health, Labour and Welfare[c7] are all involved in the development of lifelong learning. In particular, the Ministry of Economy, Trade and Industry established the Unit for the Promotion of Lifelong Learning [*Shougai Gakushuu Shinkou Shitsu*] in 1990 and has issued policy documents on lifelong learning.[8]

This reflects the fact that current 'lifelong learning policy' is not only an education policy, but also a social and economic policy. Nevertheless, whilst acknowledging these complexities, this study, for practical reasons, focuses on the analysis of lifelong learning policy in the context of the national education administration agency.

DfES and MEXT have had different approaches to the development of lifelong learning policies. This study suggests that currently, the UK and the Japanese governments prioritise different agendas for their lifelong learning policies: in England, skills development aiming for economic prosperity, and in Japan, community building [*machizukuri*] aiming for social betterment. This difference can be illustrated in more detail.

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[a] In 2001, the Ministry of Industry and Trade (MITI) became the Ministry of Economy, Trade and Industry.
[b] Examples of ongoing programmes include: *Creating a Town to Live Together* [*Kyousei no Machizukuri*], which aims to promote and protect local tradition and culture and to realise a bond in a community (2003, http://www.soumu.go.jp/machi/machig.html).
[c] The Ministry of Health, Labour and Welfare is in charge of vocational training in Japan. One example of the recent policy developments is in the retraining of middle-aged workers.

In England, the current Labour government which came to power in 1997 has consolidated the idea of lifelong learning and put it into practice. *The Learning Age* – the first comprehensive policy document on lifelong learning issued in 1998 – is the basis of its policy-making in lifelong learning.[9] The government declared, "education is the best economic policy we have",[10] making clear their perception that education and training contribute to economic prosperity. Hence, investment in human capital was seen as important for success in the knowledge-based global economy.[11] 'Success' referred to a highly skilled and qualified workforce that would enable England to compete internationally. To succeed, however, the country had to overcome a "serious weakness" – a lack of skills.[12] "Expanding further and higher education", "16-19 qualifications" and "investing in young people"[13] became dominant strategies. The establishment of the Learning and Skills Council (LSC) and initiatives such as Modern Apprenticeships[a] or the University for Industry[b] aimed to maximise "the contribution of education and training to economic performance".[14] The current strategy of the government is to skill and upskill young people and adults, and this is done under the banner of 'lifelong learning'.

In Japan, on the other hand, "a shift from *gakureki shakai* [a credential society][c] to a lifelong learning system" has been the key political objective. Recently, emphasising

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[a] Modern Apprenticeships enable young people to gain skills and qualifications which are recognised nationally so that they can start working soon after finishing a course and are available at two levels: Foundation Modern Apprenticeships and Advanced Modern Apprenticeships. The Foundation Modern Apprenticeship leads to National Vocational Qualification (NVQ) Level 2 and the Advanced Modern Apprenticeship to NVQ Level 3. NVQs are important since as recognised qualifications they set skills standards in the industry (LSC, 2003, https://www.realworkrealpay.info/lsc/default).

[b] Operating in partnership with learndirect, a publicly-funded online learning service network, Ufi provides learning opportunities of the post-16 sector in general, somewhat as the Open University does for the higher education sector. Ufi aims to enhance people's employability, and organisations' productivity and competitiveness (Ufi, 2003, http://www.ufiltd.co.uk/).

[c] The term refers to a society in which educational certificates are highly valued. There is further discussion of the definitions of *'gakureki shakai'* in Chapter Four.

community development, the government has aimed at the expansion of learning opportunities within communities and the enhancement of collaboration between schools, families and communities.[15] The Local Community Policy Unit [*Chiiki Seisaku Shitsu*][16] was established, and programmes such as the Project for Supporting the Model of Lifelong Learning Community Building [*Shougai Gakushuu Machizukuri Moderu Shien Jigyou*][a17] and the New National Children's Plan [*Zenkoku Shin Kodomo Puran*][b18] were implemented for the promotion and implementation of lifelong learning, in the community by the community. To combat the societal problem of *gakureki shakai* – e.g. extreme examination competition, efforts have been made to create a more flexible and diversified education system. 'Communities' have become the basis of hope for improvement. Greater and more voluntary involvement of local populations and the creation of stronger local bonds are seen as the key to reforming school education and to making communities a better place to live in.

Thus, it could be argued that lifelong learning has provided a policy for remediation[c] in both England and Japan. This study, however, points out that the current lifelong learning policies in the two countries have been constructed through complex political and social processes.

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[a] This project supports the building of a better local community in which citizens can make the most of their learning achievements and abilities.
[b] This project is designed to support children's learning and activities in local communities.
[c] 'Remediation' is defined here as political action taken to correct a fault, flaw or problem. Both the UK and the Japanese governments formulated lifelong learning policies as a remediation for tackling long-running problems in the countries.

It is proposed here to understand this complexity by analysing a) the current international discourse of lifelong learning, b) the processes of the shaping of lifelong learning policies in England and Japan, c) the processes of the reshaping of lifelong learning policies in the two countries and d) the relationship between the international discourse of lifelong learning and the lifelong learning policies in the two countries.

This analysis of shaping and reshaping of lifelong learning policies in England and Japan is undertaken within a comparative perspective. It should be emphasised, however, that this is not a study of "transfer".[a] As a comparative analysis, the initial proposition might be that lifelong learning policy could be seen as yet another example of "educational transfer" in which what Phillips calls "perceived deficiencies at home"[19] were tackled. Therefore, the diffusion of lifelong learning policy could be regarded as a result of "effective borrowing"[20] in which governments have taken the policy from international organisations. The shaping and reshaping of lifelong learning policies in England and Japan could be analysed, for example, by applying the four stages of borrowing suggested by Phillips and Ochs: "attraction", "decision", "implementation" and "internalisation/indigenisation".[21]

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[a] 'Transfer' is, according to Cowen, a move of "education systems, or parts of education systems, and especially the 'cultural messages' of educational systems from one country to another", and the move can be "forms of borrowing and lending of education, of forcible, colonialist transfer and of co-operative transfer, . . . or international agency intervention (1994, p.113)". One early form of educational transfer was 'adapted education', which was the imposition of educational policies by colonial empires upon dependent states. It was, as Steiner-Khamsi indicates, "assimilation, exploitation, and missionary education" which was "blinded to the patronizing aspects of educational transfer". This disregard of local resistance against transferred educational policies was eventually recognised, and in the early twentieth century, comparative education research came to emphasise that: "education should be adapted to the mentality, aptitudes, occupations and traditions of various groups (in Schriewer, 2000, pp.175-179)". Kandel, for example, wrote in 1933: "the educational systems and practices of one nation cannot be transported to another nation or to other peoples without profound adaptations and modifications (1970, p.14)". Holmes criticised "selective cultural borrowing" which referred to the imposed technical reform on dependent states and called it "misconceived comparative education (1981, quoted in Steiner-Khamsi in Schriewer, 2000, pp.174-175)".

However, this study rejects as over-simplistic the notion of a process of transfer which treats international agencies as 'lenders' and local governments as 'borrowers'. This is because transfer is more likely to have been the result of interaction between international organisations and local governments. It is suggested that the development of lifelong learning has taken place through mutual and complex processes at both international and national levels. Borrowing Levin's phrase, lifelong learning is a "policy epidemic",[22] which moves dynamically across international and national boundaries.

This study also focuses on the unusual flexibility of lifelong learning. Flexibility means that there are "different versions"[23] of lifelong learning. According to Singh, currently, "one can no longer speak of lifelong learning in [the] singular. . . . Different governments and different cultures generate differing lifelong learning patterns and policies."[24] Flexibility, however, can be seen as a source of vagueness. Thomas *et al* argue that: "The term Lifelong Learning is, in fact, structurally meaningless. . . . as a prescription for policy it lacks focus, and neglects to set out priorities and formulate definitions."[25]

At the same time, flexibility is an advantage to policy-makers: 'lifelong learning' can mean many things from primary education to learning activities for pleasure. Lifelong learning is, as Okamoto puts it, "multi-dimensional".[26] The term can be adapted to organisational or domestic circumstances.

In this perspective, it is what Steiner-Khamsi calls the "political discourse"[27] of lifelong learning that is spread globally, rather than its policies or practices. This study is concerned with how individual governments translate the discourse into policy and into practice. As Kraus argues, "lifelong learning can be context-adaptive to various different political contexts and aims".[28]

The central proposition here is that it is this 'context-adaptive' feature, i.e. the extraordinary flexibility of lifelong learning, that has led to the widespread diffusion of lifelong learning 'policy'.

Based on this proposition, this study begins with the tentative interpretation that:

The differences in the economic and social emphasis between the lifelong learning policies of England and Japan derive from both domestic and global elements. Domestically, it was different political purposes and social processes that have resulted in the different emphases. Globally, the discourse of lifelong learning has made lifelong learning extraordinarily flexible, which has permitted different lifelong learning policies to develop.

In order fully to explore the phenomena of the construction and reconstruction of the different lifelong learning policies in England and Japan, and the significance of the diffusion of lifelong learning, the following nine research questions are posed:

1. What are the major characteristics of lifelong learning policies in England and Japan?

2. What are the major characteristics of the international discourse[a] of lifelong learning?

3. When and how were major lifelong learning policies formulated in England and Japan?

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[a] 'Discourse' here means written or spoken public communications or debates about a particular subject which is taken seriously. 'Discourse' entails power which can lead to concrete actions to deal with the subject. This study chooses to use this definition to distinguish the discourse of lifelong learning from the policy of lifelong learning. 'Discourse' as used in this study does not carry the Foucauldian notion of 'discourse', which aims "to overcome the traditional distinction between what one *says* (language) and what one *does* (practice) (Hall, 1997, p.44)". Foucauldian 'discourse' is about "the production of knowledge through language. But . . . since all social practices entail *meaning*, and meanings shape and influence what we do . . . all practices have a discursive aspect (Hall, 1992, p.291)".

4. What were the strategies for the implementation of those policies?

5. When and what were the watersheds[a] in the development of lifelong learning policies in the two countries?

6. How did lifelong learning policies change in the countries?

7. What were the strategies for the implementation of the changed policies?

8. What is the relationship between the international discourse of lifelong learning and domestic lifelong learning policies in Japan and England? And, overall,

9. Why are lifelong learning policies different in the two places?

The major approach used to explore these questions is a documentary analysis. The documents used include government reports, international organisation reports, official websites, academic literature, electronic academic journals, bulletins, leaflets and newspaper articles. Additionally, the study uses interviews[b] for the purpose of probing the perspectives of experts. The interviews were helpful in obtaining up-to-date as well as unpublished information, thereby adding vividness to the study.

To seek answers to the nine research questions, the structure is as follows.

This introduction has presented the research questions as well as the framing of the study, clarifying the scope and focus of the study, defining the scope of the term and presenting the lines of argument.

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[a] Here, a 'watershed' is defined as a moment or period in which one or more than one important events occur, which marks a turning point in the history or development of something. It will be argued that England and Japan had different 'watersheds', which contributed to the different reshaping of lifelong learning policy.
[b] See Appendix.

Following on from this, the thesis is comprised of three parts.

Part One, which has one chapter, discusses the discourse of lifelong learning at the international level (research question two). After giving a brief account of the genesis and renegotiations of lifelong learning policy amongst international organisations, the chapter identifies the major characteristics of the current discourse of lifelong learning.

Part Two has four chapters, examining policy change at a local level. In Chapters Three and Four, the formulation of major lifelong learning policies in England and in Japan is analysed (research questions three and four). In both countries, lifelong learning was approached as a remediation policy for the historical problems of each country. However, there was a difference in the nature of their problems – 'the lack of skills' in England and '*gakureki shakai* [a credential society]' in Japan.

Chapters Five and Six explore how the lifelong learning policies have changed in each country (research questions five, six and seven). The remediation policies were not bringing much improvement in either England or Japan. This led both the UK and the Japanese governments to take new strategic measures to overcome the problems of the countries. Moreover, particular socio-cultural features of the English and Japanese societies have affected lifelong learning policies.

Part Three focuses on the international-local relationship. Chapter Seven – one of the concluding chapters – aims to analyse the relationship between the international discourse of lifelong learning and lifelong learning policies in England and Japan (research question eight). The significance of the characteristics of international discourse identified in Part One on local lifelong learning policies is discussed.

Chapter Eight summarises the answers to the research questions, including the answers to the central questions of the study: what are the major characteristics of English and Japanese lifelong learning policies, and why lifelong learning policies differ in England and Japan (research questions one and nine). The chapter then attempts to reflect on the study, offering future research suggestions.

Each chapter carries a summary of the research questions asked in the chapter, with a further analysis at the conclusion of each part. At the end of the thesis, beginning with Chapter Seven, the overall conclusions are developed.

First of all, the development of the discourse of lifelong learning at the international level is discussed.

ENDNOTES

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[2] John Field, *Lifelong Learning and The New Educational Order* (Stoke on Trent: Trentham Books, 2000), p.1.
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[9] Ann Hodgson, the interview of 8 July, 2002; Philip Edmeades, the interview of 9 July, 2002; Philippa Langton, the interview of 10 July, 2002; Lawrence Taylor, the interview of 10 July, 2002; Tim Down, the interview of 11 July, 2002.
[10] DfEE, *The Learning Age: A Renaissance for a New Britain* (London: HMSO, 1998), p.9.
[11] *Op.cit.*, p.7.
[12] DfEE, *Learning to Succeed: A New Framework for Post-16 Learning* (London: HMSO, 1999), p.13.
[13] DfEE, *The Learning Age: A Renaissance for a New Britain, op.cit.,* pp.13-15.
[14] DfEE, *The Learning and Skills Council Remit Letter from The Secretary of State for Education and Employment* (London: HMSO, 2000), page unknown.
[15] Lifelong Learning Council, *Chiiki ni Okeru Shougai Gakushuu Kikai no Juujitsu Housaku ni Tsuite [Measures to Improve Lifelong Learning Opportunities in the Community]* [http://www.mext.go.jp/b_menu/shingi/12/shougai/toushin/960402.htm] (1996), page unknown.
[16] MEXT, *MEXT Organisation* [http://www.mext.go.jp/b_menu/soshiki2/index.htm] (2002), page unknown.
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[18] *Op.cit.*, pp.24-25.
[19] David Phillips, 'Learning from Elsewhere in Education: Some Perennial Problems Revisited with Reference to British Interests in Germany', *Comparative Education*, Vol.36, No.3, 2000: 297-307, p.299.
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[26] Kaoru Okamoto, the interview of 12 April, 2002.
[27] Gita Steiner-Khamsi, 'Transferring Education, Displacing Reforms' in ed. Schriewer, *Discourse Formation in Comparative Education* (Frankfurt: Peter Lang, 2000): 155-188, p.183.
[28] Katrin Kraus, 'Lifelong Learning Between Educational Policy and Pedagogy: An Analysis of Concepts About Lifelong Learning from European and International Organisations' in eds. Harney, Heikkinen, Rahn and Schemmann, *op.cit.*: 33-44, p.43.

PART ONE: THE INTERNATIONAL DISCOURSE

Recently, particularly in the second half of the 1990s, lifelong learning has become a discursive norm[a] in the international educational arena. International agencies have published their policy documents on lifelong learning, showing their commitment to the development of the idea. Academics have discussed general principles of lifelong learning and their policy implications. Part One discusses the international discourse of lifelong learning, examining the characteristics of the discourse. This will enable the analysis of the relationship of lifelong learning discourses at the international and the local levels in Part Three.

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[a] This study defines a 'norm' as a condition, policy or principle which is publicly accepted as standard or expected. This study indicates that lifelong learning has become a discursive norm, meaning that lifelong learning has been accepted as usual by the international discourse.

CHAPTER TWO THE DIFFUSION OF 'A UNIVERSAL SOLUTION'

1. Introduction

This chapter seeks an answer to the second research question:

What are the major characteristics of the international discourse of lifelong learning?

The reasons for lifelong learning's central importance in the international education policy debate particularly after the mid 1990s, and the characteristics of the international lifelong learning discussions are examined.

First of all, to understand the historical contexts of the current diffusion of lifelong learning, a brief account is offered of the genesis and the regenerations of lifelong learning at the international level.

2. Development Prior to the 1990s

The idea of 'lifelong learning' has a long history.[1] "Lifelong education" as well as similar notions such as "continuous education" and "permanent education" have been used in relation to adult education since the early twentieth century.[2] The term, 'lifelong education', first appeared in English around 1920. In Britain in 1919, a committee on adult education stated:

> Adult education must not be regarded as a luxury for a few exceptional persons here and there, nor as a thing which concerns only a short span of early adulthood, but it is a permanent national necessity, an inseparable aspect of citizenship, and therefore should be both universal and lifelong.[3]

One of the members of the committee, Yeaxlee, wrote a book, *Lifelong Education*, in 1929, claiming that there should be "education as a lifelong process".[4]

However, it was only in the late 1960s that internationally, 'lifelong education' came to

attract policy-makers. One of the most significant moments in the history of lifelong learning was in 1965 when Lengrand, at that time Chief of the Adult Education Section of the United Nations Educational, Scientific and Cultural Organization (UNESCO), advocated the idea of *éducation permanente*.[5] The English translation stabilised as 'lifelong education', although "lifelong integrated education" was also considered.[6] Lengrand referred to 'lifelong education' as "the unity and totality of the educational process which we have constantly in mind".[7] In his view, 'lifelong education' was a new educational idea since it overarches all educational stages and modes, taking into consideration a range of diverse needs for individuals' self-education, self-learning and self-development.[8] Thereafter, the recognition of 'lifelong education' as an education policy was widespread. The idea of 'lifelong education' "emerged onto the policy scene with the suddenness of a new fashion".[9] The early discussions of 'lifelong education' were within international agencies such as UNESCO and the Organisation for Economic Co-operation and Development (OECD).

At the same time, one of the derivatives of 'lifelong learning', 'a learning society', was developing as an ideal model of a society. In 1968, Hutchins wrote his classic book, *The Learning Society*, in which he foresaw a future learning society:

> This would be one that, in addition to offering part-time adult education to every man and woman at every stage of grown-up life, had succeeded in transforming its values in such a way that learning, fulfilment, becoming human, had become its aims and all its institutions were directed to this end.[10]

For Hutchins, the future lifelong learning society is a society where people will be able to benefit from more free time with fewer working hours. People will learn not to work and earn, but to live a human life.[11]

Hutchins' approach to a learning society had an impact on, for example, the UNESCO

Report by Faure, *Learning to Be*, published in 1972.[12] This major document on learning showed the organisation's fundamental approach to education:

> Every individual must be in a position to keep learning throughout his life. The idea of lifelong education is the keystone of the learning society. The lifelong concept covers all aspects of education, embracing everything in it, with the whole being more than the sum of its parts. . . . In other words, lifelong education is not an educational system but the principle in which the over-all organization of a system is founded, and which accordingly underlies the development of each of its component parts.[13]

UNESCO stressed a strong humanistic concern for the "fulfilment of man", which was to be pursued in a flexible learning system which can widen access to more potential learners, incorporating informal and non-formal [a] as well as formal learning. In UNESCO's view, "education . . . should last the whole life for *all* individuals and not just be tacked on to school or university for a privileged or specialised few".[14] *Learning to Be* proposed to treat lifelong education as "the master concept for educational policies in the years to come for both developed and developing countries".[15] The phrase "a master concept" was emphasised in "the full sense of the word, including all its aspects and dimensions, its uninterrupted development from the first moments of life to the very last and the close, organic interrelationship between the various points and successive phases in its development".[16]

In 1974, Husén published a book with the exactly same title as that of Hutchins – *The Learning Society*. Arguing "*educated ability* will be democracy's replacement for

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[a] According to the Commission of the European Community, non-formal learning is a type of learning which "takes place alongside the mainstream systems of education and training and does not typically lead to formalised certificates". Non-formal learning may be provided in the workplace, through organisations or services. Informal learning is a type of learning which is "a natural accompaniment to everyday life. Unlike formal and non-formal learning, informal learning is not necessarily intentional learning (2000)".

passed-on social prerogatives",[17] Husén predicted that a future learning society would probably be more "meritocratic" since "ability and education will matter more for social upgrading than in the past".[18] Both Hutchins and Husén acknowledged 'a learning society' as an ideal society which emphasised a wider notion of learning outside school. It was a recognition of the need for a new form, a new kind of system, for education and training.

The shift from 'lifelong education' to 'lifelong learning' occurred when "recurrent education" emerged at the end of the 1960s.[19] The OECD, which considered 'lifelong education' in terms of human capital, promoted the notion of 'recurrent education' which emphasised the continuous education of everybody. The central agenda of recurrent education was "paid educational leave" deriving from the promotion of "industrial democracy".[20] In the early 1970s, the term 'lifelong education', was transferred to 'lifelong learning', which actually referred to 'recurrent education'.

As Hasan indicates, this shift of meaning can be identified in the titles of the publications: e.g. *Recurrent Education: A Strategy for Lifelong Learning, Recurrent Education and Lifelong Learning.*[21] The concepts of both 'lifelong learning' and 'recurrent education' were emphasising that "post-school education should be provided on a recurring basis, involving alternation between work and study, and opportunities for this should be available effectively to all individuals throughout their active life."[22] The introduction of lifelong learning carried the meaning of "blurring of distinctions between the blocks of compulsory education and working life".[23] In other words, 'education' was to mean not just schooling, but the opportunities which should be available throughout the active life of all adults.[24]

These international movements began to diminish when unemployment started to rise through the 1970s.[25] 'A learning society' remained as a slogan, but apart from *Learning to Be* and the introduction of the concept of recurrent education, no particular policy-making for a learning society was seen at the international level in the 1970s and the 1980s.

Similarly, at the national level, not much was achieved as a direct result of the international debates of lifelong learning between the 1960s and the 1980s. Concrete policy developments of lifelong learning were limited, although some countries, such as Sweden and Britain, indicated an intention to expand the adult education sector. What was emerging, however, as unemployment rose was lifelong learning in the context of "the new vocationalism",[a] which situated lifelong education as a means for strengthening adult workforces. Such a strategy replaced the broad humanistic ideals first introduced by UNESCO in the 1960s.[26]

During the 1990s, then, the focus of the development of lifelong learning shifted again. As Field puts it, the humanistic ideals "returned" but with "renewed vigour".[27] The emphasis on the need for learning continuously became stronger. "In the rapidly changing world", not only in terms of work and employment, but also in everyday life, individuals are required to explore a variety of learning to become adaptable and flexible.[28] Singh refers to this emphasis on lifelong learning in the 1990s as a "re-emergence".[29] It was proclaimed that the world needed "a new paradigm of social and economic development".[30] In the mid 1990s in particular, major policy documents on lifelong learning were continuously issued by international organisations.

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[a] According to Field, the term was used by the British government's left-wing critics.

In 1995, the Commission of the European Communities published a White Paper entitled, *Teaching and Learning: Towards the Learning Society*. It was argued that "an overall approach" within the Member States was needed to build a learning society in which education and training would be "the main vehicle for self-awareness, belonging, advancement and self-fulfilment".[31] Focusing on the European dimension in the context of technological and economic change, the White Paper offered guidelines for actions in the development of lifelong learning.[32] It was stressed that lifelong learning policy should address "increasing competitiveness and growth, individualized learning, accessible training, updated knowledge and combating social exclusion".[33] Subsequently, the European Commission (EC) declared the year 1996 to be the European Year of Lifelong Learning.[34]

The OECD published *Lifelong Learning for All* in 1996 and argued that:

> A new focus for education and training policies is needed now, to develop capacities to realise the potential of the 'global information economy' and to contribute to employment, culture, democracy and, above all, social cohesion.[35]

In other words, the OECD was emphasising a need for a multi-purpose policy – which was to be lifelong learning.

In the following year, UNESCO issued *Learning: The Treasure Within*, claiming:

> A key to the 21st century, learning throughout life will be essential, for adapting to evolving requirements of the labour market and for better mastery of the changing timeframes and rhythms of individual existence.[36]

Learning: The Treasure Within set up "the four pillars" of education and learning to foster "whole beings",[37] and embraced various forms and aims of learning. First, "learning to

know" which aimed at self-development, where the emphasis was that knowing enables individuals to live and to communicate and brings the pleasure of understanding and discovering. Second, "learning to do", which leads to skills and knowledge, and employment, with the proviso that learning is more about wider competence than occupational skills. The third pillar is "learning to live together, learning to live with others" which encompasses the claim that education should contribute to discovering others and to experiencing shared purposes throughout life.[38] This learning is about community development, social cohesion and global understanding. Fourthly, in terms of self-fulfilment, "learning to be" is identified and stresses that education must create all-round human beings who have "intelligence, sensitivity, aesthetic sense, personal responsibility and spiritual values".[39] These four pillars enable the creation of a learning society which encompasses "political stability with informed citizens", "economic progress with skilled workers" and "social justice with enlightenment".[40] These principles indicate UNESCO's broad understanding of 'learning' as embracing various aspects of human life and national prosperity.

Against this background, the current position is that "the policy consensus in favour of lifelong learning is virtually unanimous" amongst international agencies and national governments.[41] UNESCO points out that lifelong learning is recognised today as an indispensable "guiding and organizing principle of education reforms . . . to enable education to face its multiple current and emerging challenges".[42] The EC is also of the view that lifelong learning together with the knowledge economy has become the central agenda in education.[43] The OECD goes further: lifelong learning is "taking shape".[44] Member countries have begun to work on operational issues to provide "lifelong learning for all", pursuing a balance between economic, social and cultural considerations.[45]

This brief overview demonstrates how, since the emergence of the concept in the early twentieth century, the idea of lifelong learning has been developed, and during the past decade, as education policy has been widely diffused. At present, lifelong learning has become one of the major topics of educational debate.

'Lifelong learning' and its derivatives, 'a learning society' and 'a lifelong learning system', have become familiar terms in both international and local discussions. There is an indication that the terms may have become "a cliché in educational parlance", giving "a trendy flavour" to educational literature.[46]

Nevertheless, international organisations and national governments have accepted and promoted the idea of lifelong learning because of its obviously attractive motifs: learning is 'good', and everybody can learn throughout their lives. It is a broad idea which is difficult to find fault with and which is, therefore, difficult to resist.

Lifelong learning has become a 'given' in the 1990s internationally. Therefore, it is important to explore the recent discourse on lifelong learning in more detail. The next section focuses on this, asking the research question, *what are the major characteristics of the international discourse of lifelong learning?*

3. The Current International Discourse

1) 'Global Change' and 'Social Justice'

This section points out that in the 1990s, lifelong learning became a discursive norm. The majority of international debates on lifelong learning claim, as this section suggests, that it is 'global change' which has brought about a need for lifelong learning and that it is lifelong learning which can bring 'social justice'. In examining the characteristics of the

international discourse of lifelong learning, Edwards' classification of global changes is borrowed: i.e. economic, cultural, technological and demographic.

The first aspect of global change – **economic change** – is "dominant . . . in promoting the need for and shaping the directions of change".[47] Edwards identifies three different kinds of economic change: "changes in the macro-economy associated with the globalisation[a] of capital investment", "changes in the type and organisation of work" and "changes in the skills required for employment".[48]

Other scholars have also identified a strong link between the economy and globalisation. Ritzer, for example, considers globalisation "largely an economic process" which is "a twin process of cross-border corporate expansion and intensifying global competition, in which the world's trading and manufacturing activities are woven increasingly closer together".[49] Ball also stresses that: "the key change . . . is from a Fordist, welfare corporatism to a market model"[50] wherein "the prosperity of workers will depend on an ability to trade their skills, knowledge and entrepreneurial acumen in an unfettered global

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[a] Definitions of 'globalisation' vary. According to Held, the term refers to "a multi-dimensional phenomenon involving domains of activity and interaction that include the economic, political, technological, military, legal, cultural and environmental", and each sphere "involves different patterns of relations and activities" (in Holden, 2000, pp.19-20). A similar point is made by Thompson who uses the term "enmeshment" meaning "the complex patterns of reciprocal interdependency and integration" (in Held, 2000, p.90). According to Brown, globalisation has become "all-embracing" and is most often used to describe "a process of change" (1999, pp.3-4; p.15). In reference to 'a process of change', a general definition is offered by Held *et al*: the "widening, deepening and speeding up of worldwide interconnectedness in all aspects of contemporary social life (1999, p.2)". Waters also offers a general definition: "A social process in which the constraints of geography on social and cultural arrangements recede and in which people become increasingly aware that they are receding (1995, p.3)." More precisely, 'globalisation' or "worldwide interconnectedness" as Held *et al* call it, is about "flows of trade, capital and people" across the globe, which are facilitated by "physical infrastructures such as transport or banking systems, normative expectations such as trade rules and some cultural convergences such as English as a lingua franca" (1999, p.3). Ball indicates that the "globalisation thesis" is "ubiquitous", being able to explain "almost anything and everything" (1998, p.120).

market place".[51] Education policy is something that the government is no longer prepared to fund as it used to under the social democratic conditions of the welfare state.[52] The OECD acknowledges the current version of globalisation is new in its "specificity": "market deregulation", "the advent and spread of new information technologies" and "the globalisation of financial markets". "In this global economy, the balance of imports and exports is closely linked to the skills of the labour force in producing marketable goods and services with high value-added."[53]

The concept of globalisation as capital investment has also affected education. Education and learning are treated as "strategic investment" since "the skills of the workforce are elements in a strategy for promoting the economic and social well-being of nations".[54] Emerging in the 1970s and developing in the 1980s, the idea of using the concepts of the market stemmed from the necessity for cutting the rising costs of education – and the market principle of free competition has been seen as an effective means of promoting the quality and flexibility of national education systems.[55] The global economic system has led to "an overwhelming emphasis on skills and techniques".[56] Particularly skills for work are emphasised:

> The workforce is 'upskilling', both in terms of the average educational level of workers and the types of job that they are performing. . . . Work is becoming more skilled across industries and within individual occupations.[57]

"Workplace competencies" – communication skills, problem-solving skills, the ability to work in teams and ICT skills, which are increasingly regarded as foundation skills[58] are a requisite in the global economy. Lifelong learning became a means of "contemporary political rationalities", which

> rely upon and utilize a range of technologies that install and support the civilizing project by shaping and governing subjects and enhancing their social commitment, yet are outside the formal control of the 'public power'.[59]

In this changing world, "employability" and "broad-based knowledge"[60] which increase flexibility and competitiveness have become "the requirement", which resulted in the focus on lifelong learning "in the realms of economic policy".[61]

The OECD argues that both individuals and societies are having to adapt to "structural changes",[62] which are affecting international trade, labour market structures, work organisation and the nature of work.[63]

The OECD argument is that industrial structures in OECD countries have shifted towards an increase in "high-wage" and "high-technology" industries; as a result, the traditional employment patterns of unskilled jobs are now decreasing in some countries, and there is a strong demand for "highly-skilled professional, technical, administrative and managerial occupations".[64] Such jobs require a longer and higher level of formal education and training of which the outcomes are qualifications.[65] Generic qualities such as teamwork, creativity, entrepreneurship or problem-solving as well as a broadening of technical skills and knowledge are emphasised.[66]

Furthermore, according to the OECD, the "work environment" is changing because of technological and industrial structural change. The move is towards a "high-performance" and "flexible workplace", which calls for continuous education and training.

Also, the OECD indicates that the decline in working hours and changes in work arrangements have been seen across many Member countries. This has an implication for an increase in the time available for family life, hobbies or further training.[67] On the other hand, unemployment still remains an unsolved issue amongst many Member countries.

Thus, education systems are expected to contribute to decreasing youth unemployment and to enhancing social cohesion.[68]

In the global market, capital becomes more internationalised and national economies more integrated into global market mechanisms; therefore, flexibility becomes necessary as a form of capital accumulation.[69] In other words, the world of work is increasingly becoming "knowledge-based" and "technology-driven": the service sector continues to expand; self-employment and entrepreneurial activities increase.[70] The conditions of work – 'knowledge-based' and 'technology-driven' – emphasise for individuals the continuous acquisition of knowledge and skills.

In addition to flexibility of "capital markets" or "production techniques", therefore, "flexibility" also refers to the "up-skilling" and "multi-skilling" of the labour force.[71] The lifelong processes of education and training are required to enhance personal abilities, technical skills, values and attitudes as well as "core skills and competencies": such as "learning to learn", "problem solving", "critical understanding" and "anticipatory learning" all useful in adapting to each employment situation and coping with change throughout life.[72]

'Flexible workforces' and 'competitiveness' have been a common theme in recent policy debates. Being competitive involves, for enterprises, their higher adaptability to respond to market changes with workforces which have transferable skills and knowledge. For individual workers, it means that they can no longer rely on lifetime employment and should be ready for moving jobs and developing new skills and competences.

In other words, competitiveness – "profitability in the private sector, efficiency in the public sector" – is increased by flexible workforces. To enhance flexibility and competitiveness of the workforces, training and retraining have to be provided, and this was a trigger for the movement for reforming the post-compulsory sector in many developed countries.[73]

Flexibility and competitiveness of the labour force are significant to the whole society. As the demand for a flexible and competitive workforce increases, the wider the division becomes between the core workers who have secure jobs and the peripheral workers who are temporarily employed or unemployed. Those at the periphery are at risk of poverty and a threat to the core, and consequently, the whole society becomes subject to "insecurity".[74] The EC shows a similar concern. The current emphasis on investing in people and acquiring knowledge and competences can bring about greater inequalities and social exclusion.[75]

A critical summary of the simplified approach to lifelong learning which focuses on skilling comes from Wain. Such an approach is a "myth", which:

> connects the utopian dreams of the present and future with the interest of employers and of advanced capitalism, and the attainment of increasing levels of performativity. It [the myth] emphasizes the optimal development of human capital through and investment in lifelong learning strategies, working with the assumption that a learning society that articulates these strategies will stay competitive in the global economy.[76]

"A learning market" could create a fragmented society since individualism and competition is what the market is about.[77] The international discourse of lifelong learning emphasises the link between learning and employment, and the treatment of lifelong learning within the principles of the market and individualism, but at the same time, the problems of such a link and a treatment are acknowledged.

Thus, the international discourse treats that economic changes represented by the global economy, diversified labour structures and high skills requirement have made lifelong learning necessary. Lifelong learning is located as an integral means of adapting to these economic changes. It is proclaimed that the development for the global market and the knowledge-based economy has brought about the need of adaptability at the global, national, business and individual levels. Globalisation and lifelong learning have been treated as being inseparable since in the globalised world, lifelong learning is seen as "a defence against global competitors".[78] Flexible national systems of education and training are seen as compulsory. As the EC argues: "The crucial problem of employment in a permanently changing economy compels the education and training system to change".[79] States are required to educate and train their people to excel over the competitors. Employers are expected to be involved in training their employees and to meet the needs of the local community. Individuals are required to pursue "a continual replenishment of their education",[80] i.e. continuous updating of knowledge and skills. The international discourse of lifelong learning argues that lifelong learning, i.e. reskilling and upskilling, enables nations, business and individuals to meet diverse global economic needs. Furthermore, through the provision of learning 'for all', it is proclaimed that social justice can be achieved.

As indicated earlier, Edwards recognises as the second aspect of global change **cultural change,** in which two major areas are identified: identity and consumption. On identity, Edwards indicates (using Giddens) that: "modernity, . . . signifies the loss of tradition at a personal as well as a social level", and the person becomes "a reflexive project".[81] Similarly, in Beck's words: "Biographies" have become more "self-reflexive" and "destandardized". A "socially conditioned biography", which was formed within traditional ideological ties of family or class, has transformed to "a more self-decided and

self-organized biography", which forms within freedom of choice and self-responsibility.[82]

However, self-reflexive biographies are not necessarily an equivalent of "autonomy and emancipation of the individual subject":

> With the diminishing bonds with traditional social and ideological groups of reference, the individual becomes more dependent on the disciplining and uniforming institutions and procedures that dominate the political and economic system as the essential conditions for its existence. So individuals are expected to take responsibility for their own lives and to make the right decisions to further their own career chances while being dependent on conditions that they can hardly see through, and certainly not determine.[83]

The process of individualisation, therefore, contains risks. Individuals are compelled to make choices from the vast amount of information produced by the society and the state. However, to obtain all the existing information is unrealistic. Hence, society and individuals come to depend on "expert systems" in making choices, but without any guarantee. Griffin suggests that continuous "reflexive self-questioning" itself can be a stressful process, and "existential anxiety" can be a consequence.[84] Moreover, reflexive selves are subject to "multiple identities",[85] which are also a risk. "World views, belief systems and styles",[86] as Field indicates, proliferated through mechanisms such as "instantaneous global communication", "mass transportation",[87] "global diasporas"[88] or "taste, habits and beliefs" exhibited to "a global audience", uprooted from their locale.[89] Thus, globalisation is reflected in cultural change.

Beck calls the current society "a risk society" in which "reflexive modernisation" is taking place. This means the effects of the modernising processes on the conditions of the "classical industrial societies" themselves: i.e. class, family, neighbourhood, science, democracy. In the industrial societies, "the great social issue was the (unequal) production and distribution of social wealth", but in the risk society, "the administration

and distribution of different kinds of risks . . . are produced in and by the ongoing processes of modernization".[90] In a contemporary 'risk society', economic modernisation threatens humanity which is a "global collective concern".[91] Contemporary 'risks', therefore, have an impact globally. As Edwards indicates here, a need for lifelong learning emerges so that individuals learn critical reflection.[92] Lifelong learning is seen to be responsive to aspects of 'a risk society' such as "the danger of losing control over technological and scientific innovations", "the internationalization of political structures" or "the growth of a much more flexible labour force".[93]

'A risk society' in which globalisation plays a large part addresses not only "global collective concerns". As Edwards and Usher write: "Globalization is described as meaning both 'global unity as manifested for example in transnational capital, satellite television, the Internet and patterns of consumption' while also being 'characterized by diversification'."[94] This is because "peoples and cultures seek to re-establish their own identities in this world process, and create a counter process of fragmentation".[95] There is a more negative explanation; "a harmonious world society", "a universal process of global integration" or "convergence of cultures and civilizations" are far from reality. This is because first, "interconnectedness" can create "new animosities and conflicts" and can activate "reactionary politics" and "deep-seated xenophobia", and second, certain groups of the global population will remain "untouched" or "excluded" from globalisation processes.[96] According to the international discourse of lifelong learning, these 'untouched' or 'excluded' populations can be saved through the actualisation of social inclusion and regeneration.

According to Edwards, the other aspect of cultural change is about consumption, which is described as "consumer culture": in the contemporary period, "consumption is a

signifying system that differentiates selves wherein identity is constructed through consuming experiences and symbols."[97] Although there is a concern about "oppressed groups", in the contemporary world, everybody is influenced by consumer culture in one way or another.[98] Not only merchandise, but also cultural goods are treated within "market principles of supply and demand", and operated with an emphasis on individual "lifestyles and identities". "Consumer culture . . . implies a structured set of values, attitudes and behaviour, which constitutes a coherent means of communication; a differentiation between people, with goods and services acting as markers of difference."[99] According to Field, markets for "personal services", e.g. insurance, have expanded as well; similar services which used to be available through the state are increasingly "purchased" by individuals.[100] And, here again, education and learning are not exceptions. Culturally, the development of the notion of "individual self-development" has prompted growing markets for the provision of qualifications, promoting understanding of and control over selves.[101] These notions of self-development and self-control, i.e. individual responsibility, are an important component of the international discourse of lifelong learning.

Field summarises the correlation between developments in consumer culture and the growth of interest in lifelong learning:

> First, long-term changes in affluence in general enable adults in richer social formations to exercise greater choice in the purchase of goods and services. Second, the notion of citizens as consumers stands at the heart of much contemporary policy development. This is part of an ideological shift where the supply of lifelong learning is governed by a consumer orientation and a growing private sector of providers of opportunities. . . . Third, education activities have become consumer goods in themselves. . . . Fourth, contemporary culture is marked by individualisation and this is also characteristic of trends in lifelong learning. . . . lifelong learning is increasingly oriented towards the recognition that adults can continue to change throughout their lives. Fifth, there is a growing notion that learning is an enjoyable thing.[102]

Both cultural change and the recognition of the need of lifelong learning have developed, influencing each other. Diversified learning needs stemming from individualisation, 'reflexive modernisation' and consumer culture can be met through the provision of lifewide learning opportunities, i.e. formal, informal and non-formal learning. Overall, the process of individualisation has contributed to the construction of the notion of individual responsibility which is an important principle of lifelong learning in many of developed countries.

These economic and cultural changes are interrelated with **technological change**, which is the third aspect of change being considered. Technological change is often regarded as a consequence of globalisation – the interlink "across space and time".[103] The development of technology has contributed to reorganising "space-time at many levels – both national and global – and in many ways".[104] As the OECD puts it: "massive diffusion of information technologies" has brought "pervasive" impacts throughout economic and social systems.[105] "Advances in technology tend to be held to be inherently beneficial and progressive, almost inevitable"[106] in relation to the economy.

As Edwards argues, technology has influenced both job creation and loss, forms of employment, the nature of 'skills' and the requirement for the constant updating of the new types of skills and therefore, competitiveness and productivity. The number of international enterprises has increased due to the speed of communication and transportation, "exploiting the relatively low production costs and skill bases of newly industrialising countries". At the same time, technological change challenges the need for a secure and readily available supply of labour.[107]

The general argument goes that: "the skill level, technical expertise and flexibility of the

workforce are generally considered important elements in determining the speed and success of implementing new technologies and adapting organizations to rapidly changing demands in a highly competitive international environment."[108] Governments and corporations are frightened of being left behind by competitors due to technological lags.[109] Tuijnman, referring only to tendencies in Europe, points out that a general claim has been that a competitive 'high tech' industry determines "economic well-being". It has also been claimed that "underinvestment in vocational education and job training" resulted in "under- and de-skilling" of the European labour force. Since the 1980s, therefore, most European countries have prioritised improving vocational training.[110]

Communications technology has had a significant impact. "Goods, services and people are able to move around the globe much quicker than in previous periods."[111] Also, the Internet, cable and satellite have become major tools for communication and obtaining information.[112] As Field claims, the "industrial and agricultural phases of our history" have passed, and the era of "the knowledge society" has arrived.[113] It is a society in which "knowledge intervenes upon knowledge itself in order to generate higher productivity".[114] As the EC acknowledges, in the 'knowledge-based society' in which advanced technology is a norm, citizens benefit from increased opportunities in terms of communications, travel, employment and participation in social activities. The more knowledge and competences one acquires, the more chances one gets in taking advantages of these opportunities. Hence, investment in human capital is important.[115] "Knowledge" currently has a "new role" in making the whole society skilled, qualified and educated.[116]

Also, technology has altered the conception of 'literacy'. In addition to the traditional form of literacy, "media literacy" has come to be situated as a part of a core curriculum.[117]

Using new technologies can be effective for fostering "learning to learn". "This adds a significant concern to that which already exists over the more conventional literacy difficulties experienced by adults. . . . technological change may represent yet a further barrier to social and economic participation."[118]

Thus, technological change plays a dual role in lifelong learning. First, because of technological development, learning throughout life has become unavoidable. To catch up with rapidly advancing ICT, updating and renewing knowledge and skills are required. In 'the information age', new literacy, knowledge and analytical skills are required to be able to handle new technologies. Educational institutions have a new role to play by offering to all opportunities for the new requirement.[119] At the same time, ICT creates "a condition" for lifelong learning. As "a powerful tool", technologies enable widening of participation, further learning and autonomous learning.[120] ICT provides "new possibilities for the design, production and delivery of learning opportunities" with flexible, open or distance approaches.[121] While technological advancement has necessitated continuous updating of knowledge and skills, technologies simultaneously realise a variety of learning modes and opportunities. With this dual role, the significance of technological change to lifelong learning has been dramatic.

Edwards argues that in cultural and technological changes (as well as economic), a shift in demography has had an impact globally. **Demographic change** refers to the drop in the birth rate and a rise in longevity. This has been the trend in most of the developed countries.[122] The change has significance for the economy: the proportion of young people in the labour force is decreasing; whereas the proportion of the elderly who are either working or not working is increasing, and there are resulting educational needs for elder non-workers who wish to have jobs.[123] Lifelong learning is, therefore, borrowing

Wilson's words, an "ethical solution" to dealing with the ageing population.[124] With lifelong learning, however, governments aim "to increase individual and familial preparation and responsibility for one's old age, as a condition for curtailing publicly provided pensions and services, and for cutting direct taxation".[125] As Tight argues, the promotion of lifelong learning refers to the production of independent and self-directed learners who can engage in learning activities voluntarily. In coping with the aging population, lifelong learning has a role of reducing or delaying financial dependency of "the third agers".[126]

The OECD, for example, indicates that the aging population of its Member states is a serious concern. The dependency ratios of the aged increase, and consequently, public expenditure is directly affected; lower fertility rates imply a lower inflow rate into the labour market as well as into education.[127] "The 'demographic timebomb' aligned with the concerns for economic competitiveness has provided strong support for increasing the opportunities available for adults to become lifelong learners."[128] This has happened in parallel with the growing needs of higher qualified workforces for businesses. Workers whose working life may be prolonged have come to be more aware of the need for constant training and retraining; employers have come to act on providing more training to employees responding to changing skills demands over a longer period. Demographic change has influenced the constitution of students in higher education as well. Not only are mature students encouraged to return to studies, but also all possible students are recruited under the name of "widening access".[129] Also, a lifelong learning system is seen as a "second chance system"[130] for those who did not or could not obtain education or training when they were younger.

The impact of globalisation on global demography is indicated by the OECD as well. The

movement of people, including tourists, immigrants, migrants and asylum-seekers has increased.[131] Demographic change also addresses the increase in nuclear families and "solitaries". Populations have become multi-cultural and diverse. Consequently, people's learning needs vary widely, e.g. immigrants' need for second language acquisition, and local residents have to learn new ways of living together with immigrants. Individuals are expected to become active citizens, participating in the building of democratic societies. These changes in living environments have been affecting all citizens.[132] Also, the "values and belief systems" of families and communities are changing. "New ways of organising family relationships", which often have economic effects, have to be taken into consideration in education for children and adults.[133]

"Valuing diversity" is necessary,[134] and lifelong learning has a role to play in responding to these diversified needs derived from demographic change. Field indicates that lifelong learning is expected to foster "a global citizen" in the globalised world. To cope with and embrace globalisation, "information mobility" can be enhanced through the promotion of lifelong learning.[135] Also, as the Council of Europe points out, the meaning of "participative democracy" and "the status of the citizen"[136] in the globalised world should be revisited. It is claimed that enriching learning opportunities not only of technical, transferable skills, but also of linguistic, interpersonal, cultural skills and attitudes can contribute to building coherence and understanding in the globalised world.

Thus, demographic change is important. The notion of 'learning throughout life' has the aim of keeping the elderly active and positive. Moreover, states are seriously concerned about the issue of aging because of its implications for an increase in public expenditure on such items as health care and pensions. The idea of lifelong learning, which is based on the principle of self-funding and autonomous learning, fits an aging society. Lifelong

learning is a means of delaying the financial dependency of the elderly. Secondly, the other role that lifelong learning has in relation to demographic change is to enable global citizens to live together. Citizenship education, learning about cultural diversity and building a community bond are located as central components of lifelong learning. In other words, for living with global demographic change, lifelong learning is seen as an important strategy.

This section has aimed to characterise the international discourse of lifelong learning. There are two main features. The first is that it is 'global change' that has made lifelong learning necessary. The second is that lifelong learning can bring 'social justice', through lifelong and lifewide learning for all. In terms of the first 'global change' argument, the international discourse of lifelong learning tends to address the four forms of change – economic, cultural, technological, demographic – within the overarching phenomenon of globalisation. Globalisation as both a convergent and divergent phenomenon can be interpreted as "standardisation"[137] or "McDonaldization",[138] and at the same time, as "diversification".[139] These changes have led to the recognition that: "Education can no longer be restricted to educational institutions but must be recognized as lifelong learning."[140] As Evans indicates, the political ideology of "globalism" and "a revolution in learning" has meant difficulty in refusing the notion of "permanent learning".[141]

A brief summary of the four forms of global change is useful here. In terms of economic change, the discourse of lifelong learning centres on the idea that the global economy requires flexibility and competitiveness in the labour force, and lifelong learning has a role to ensure that. The cultural change of a greater emphasis on individual choices and consumption affected the field of education, training and learning. New technology, e.g. the Internet, which has become a part of everyday life, is both a means and an end to

learning itself, and there is a need for technological provision for all. As a response to demographic developments which include aging populations and people's mobility globally, lifelong learning has a role to play in enabling more varied learning opportunities. The scope of these theories is relevant in many of the developed countries.

In short, the international discourse of lifelong learning treats 'global change' as a trigger for lifelong learning. This 'global change' argument leads to the 'social justice' argument. Through the practice of lifelong learning, which is claimed to offer lifelong and lifewide learning opportunities for everybody, the international discourse of lifelong learning tends to argue that lifelong learning is beneficial to states, industries, communities and individuals. Lifelong learning not only brings national prosperity and industrial development, but also enhances social cohesion and self-actualisation. In this sense, social justice can be achieved through lifelong learning.

Thus, the international discourse of lifelong learning, as characterised by the 'global change' and 'social justice' arguments, has become a discursive norm. According to Henry *et al*: "Today, lifelong learning or lifelong education has acquired wide currency. It represents a policy priority across many countries".[142] UNESCO, for example, proclaims that 'learning throughout life' should be promoted through all the institutions of society to respond to "new challenges". Individuals are expected to learn to contribute to more open societies and to adapt to global economies.[143] The 'global change' and 'social justice' arguments are seen as, borrowing Hodgson's expression, "a given": "lifelong learning has become . . . universally accepted in policy debate as a concept and as a goal for governments".[144] Henry *et al* point out that lifelong learning is a "converging policy".[145] Jarvis also indicates that the themes of lifelong learning have become internationally similar.[146] The claimed need for lifelong learning has become greater than ever.

Some of the other consequences of the international discourse of lifelong learning are illustrated in the second half of this chapter.

3) The Outcome of the International Discourse

This section aims to demonstrate the outcomes of the international discourse of lifelong learning which is characterised with the two main themes of 'global change' and 'social justice'. The approach taken here is to look at the current main strategies of international organisations which have played a leading role in the development and promotion of lifelong learning: UNESCO, the OECD and the EC. The illustration starts with UNESCO.

a) UNESCO

In one of its most recent documents, *Integrating Lifelong Learning Perspectives* issued in 2002, UNESCO Institute for Education (UIE)[a] states that: "Lifelong learning is a guiding and organising principle of educational reform that is gaining new relevance and posing formidable challenges as it requires a fresh look at the concept of learning." Moreover, it is stressed that the organisation of "learning throughout life has taken on a new and even broader urgency".[147] The urgency derives from "a need to keep pace with rapid socio-economic and technological changes notably, globalization and the growth of information and communication technology".[148]

In adapting to these changes, UNESCO emphasises that lifelong learning goes beyond the traditional notion of education:

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[a] A non-profit international research, training, information and publishing centre on Adult Education and continuing education.

> the boundaries of the concepts of education are widely and increasingly pushed, where education is seen as having a vital role to play in areas such as sustainable development, empowerment of women, HIV/AIDS prevention, the world of work and the search for justice, peace and democracy.[149]

Reemphasising that "people learn throughout life",[150] UNESCO discusses further why people should learn. Diverse contemporary societies compel individuals to make choices about what to do and how to live. Lifelong learning can optimise "multi-disciplinary" features of life and society.[151] At the same time, lifelong learning contributes to global strategies to eliminate poverty and to promote citizens' political, social and cultural participation.[152] 'A lifelong learner' is one with multi-characteristics, in which learning takes place anytime and anywhere in one's life.[153] The UIE emphasises that lifelong learning includes "non-formal basic education, vocational and non-work-related adult education and re-training programmes, distance learning and similar developments".[154] These learning activities can take place in various environments: as private learning, at school, in a community, at the workplace, or in wider national and global contexts.[155] Lifelong learning as 'a master concept' can encompass both "vertical articulation (across life span)" and "horizontal integration (school, media, university, workplace, community – formal, non-formal, informal, vocational)".[156] This understanding of lifelong learning is the same as that of the international discourse of lifelong learning: lifelong and lifewide learning for all.

UNESCO's theme is that lifelong learning is no longer a nationally closed agenda but a globally shared policy, which requires international-scale collaboration. Lifelong learning offers benefits at the levels of individual, community, national and international, bringing a lot of positive consequences – individuals' careers, nations' economic and democratic development and sustainable world development. In the UIE's words, "the entirety of humanity"[157] is the target of lifelong learning. This goes back to the four principles – learning to know, to do, to live together and to be. The role of lifelong learning is seen as

the delivery of social justice, practising lifelong and lifewide learning for the whole global population.

b) OECD

The second international organisation is the OECD, which published a comprehensive policy document on lifelong learning, *Lifelong Learning for All*, in 1996.[158] It emphasises "lifelong learning for all as the guiding principle for policy strategies that will respond directly to the need to improve the capacity of individuals, families, work-places and communities continuously to adapt and renew".[159] The OECD stresses that adaptation and renewal are necessary in the changing world in which:

> The large and continuing shift in employment from manufacturing industry to services, the gathering momentum of globalisation, the wide diffusion of information and communications technologies, and the increasing importance of knowledge and skills in production and services are changing the skill profiles needed for jobs. The distribution of employment opportunities is changing. . . . With the more rapid turnover of products and services, and with people changing jobs more often than previously, more frequent renewal of knowledge and skills is needed.[160]

Additionally, "the ageing of populations, emerging new values and patterns of leisure and work, and changing family relationships"[161] are significant components of global change. The OECD considers that lifelong learning is "an important factor in promoting employment, economic development, democracy and social cohesion in the years ahead".[162]

The OECD argues that 'lifelong learning' is a "cradle-to-grave"[163] concept: i.e. "the continuation of conscious learning throughout the life-span, as opposed to the idea that education stops at 16, 18 or 21."[164] In a recent publication, the significance of lifelong learning particularly in the field of early childhood education and care is reemphasised. The early years form the foundations of 'learning to learn' and 'learning throughout

life'.[165]

With the intention to make lifelong learning "a reality *for all*",[166] the OECD argues that the objectives of learning should be lifewide, not simply to provide "a second or third chance for adults": i.e. "to foster personal development", "to strengthen democratic values", "to cultivate community life" and "to maintain social cohesion".[167] Learning is for individuals, communities and the society. The approach is to integrate the whole educational sphere with lifelong learning:

> 'Learning' is not associated only with formal education and training. People learn not only in classrooms, but informally at work, by talking to others, by watching television and playing games, and through virtually every other form of human activity.[168]

A variety of learning modes apart from formal schooling are acknowledged.

The 'inequalities' and 'imbalance' pointed out in *Lifelong Learning for All* are discussed in detail in later OECD documents. 'Exclusion', for example, is a complex issue which can address geographical marginalisation, "a lack of social belonging" or individualised lifestyles.[169] According to the OECD, there is a rigidity in the uneven provision of education despite the overall rise in the standard of living and equal opportunities. Combating these inequalities and imbalance is necessary for improving both the society and the economy. With all the complexity of these global concerns, the OECD argues that learning can meet diverse needs[170] and that learning can reduce the risk of excluding individuals, fostering citizenship in individuals.[171] Lifelong learning is all-purpose, in OECD's view.

The OECD makes clear that lifelong learning is about both human and social capital. Education and training have "a crucial role" to develop "knowledge and skills – human

capital" – which are "an important determinant of economic growth and social development", but "social networks, norms and values – social capital" – are equally essential for "well-functioning democracies, with active participation by citizens".[172] Both human and social capital have to be developed within the framework of lifelong learning systems to "to manage the challenges and tensions of an increasingly interdependent, changing and conflictual world".[173] In putting 'lifelong learning for all' into practice, the OECD reaffirms the importance of "a balanced view" of the multiple objectives which relate to personal, economic, social or cultural outcomes.[174]

Since *Lifelong Learning for All*, the OECD has discussed education and training from various aspects within the framework of lifelong learning. The OECD stresses "a systemic view", which is to "build strong linkages between learning at different stages of life and in a wide range of settings . . . looking at various forms of education and training provision",[175] examining "the demand for, and the supply of, learning opportunities, as part of a connected system covering the whole lifecycle and comprising all forms of formal and informal learning."[176] This interpretation is common to the international discourse of lifelong learning.

c) EC

In the European Union (EU), during the second half of the 1990s, the growing recognition was that lifelong learning should become "the common guiding principle for the new generation of Community education, training and youth programmes".[177] Since the 1996 European Year of Lifelong Learning, the EC has become more devoted to the development of its lifelong learning policy. In 2000, the new approach to lifelong learning was put together as *A Memorandum on Lifelong Learning*, in which it was advocated that the time to implement a broader vision of lifelong learning had come, emphasising a new

role for lifelong learning – a means of combating social exclusion.[178] The Memorandum led to the EC's policy document on lifelong learning, *Making a European Area of Lifelong Learning a Reality* issued in 2002, which reaffirmed the European commitment to lifelong learning.[179]

The document's logic is that it is global change that has brought about a need for lifelong learning:

> Economic and social changes associated with the transition to a knowledge-based society present the European Union and its citizens with both benefits – in terms of increased opportunities for communication, travel and employment, and risks – not least relating to higher levels of inequality and social exclusion.[180]

A "renewed emphasis" on lifelong learning is acknowledged since "people, their knowledge and competences are the key to Europe's future".[181] Citizens are required to be able to deal with "the consequences of globalisation, demographic change, digital technology and environmental damage".[182]

Making a European Area of Lifelong Learning a Reality introduced the idea of "a European area of lifelong learning" which is defined as: *"all learning activity undertaken throughout life, with the aim of improving knowledge, skills and competences within a personal, civic, social and/or employment-related perspective".*[183] 'A European area of lifelong learning' is proposed as "the European social model" in which lifelong learning is positioned as a basic component. Broadly, there are economic and social dimensions.

> In economic terms, the employability and adaptability of citizens is vital for Europe to maintain its commitment to becoming the most competitive and dynamic knowledge-based society in the world. . . . [Lifelong learning] has a key role to play in developing a coordinated strategy for employment and particularly for promoting a skilled, trained and adaptable workforce.[184]

In terms of social contribution:

> [Lifelong learning] promotes the goals and ambitions of European countries to become more inclusive, tolerant and democratic. And it promises a Europe in which citizens have the opportunity and ability to realise their ambitions and to participate in building a better society.[185]

Out of this vision, four objectives of lifelong learning within the EU are put forward: "personal fulfilment", "active citizenship", "social inclusion" and "employability/adaptability",[186] and six key action plans are consolidated.

Thus, the EC takes a broad perspective on the development of lifelong learning, aiming for economic, social and individual benefits. Therefore, conventional approaches to learning, which were centred upon formal education, are criticised, and non-formal and informal learning are stressed.[187] Education and training systems used to be rigid and limited, but in contemporary societies, the systems should adapt to individual needs and demands.[188] "Lifelong learning sees all learning as a seamless continuum 'from cradle to grave'".[189] 'A continuum' refers to "high quality basic education" followed by "initial vocational education and training", which should enable young people to cope with a knowledge-based economy, and firm integrated learning for adults.[190]

Such a notion of learning undertaken in any kind of environment at any stage of life is reconfirmed with an emphasis on 'lifewide' learning. According to the EC, "useful and enjoyable learning can and does take place in the family, in leisure time, in community life and in daily worklife",[191] either in formal, informal and non-formal environments.

The EC's expectation of lifelong learning is high: "lifelong learning places the emphasis on people and on collective aspirations to create a better society. Lifelong learning values knowledge and competences gained in all spheres of modern life, and which are

therefore relevant to coping with modern society."[192] With the provision of a variety of learning opportunities taking place in diverse environments, the four objectives – 'personal fulfilment', 'active citizenship', 'social inclusion' and 'employability' – are believed to be achievable. As can be seen, there is a commonality between the international discourse of lifelong learning and the EC's approach to lifelong learning. 'A European Area of Lifelong Learning' also addresses the 'global change' and 'social justice' arguments.

4. Summary

This chapter has discussed the research question:

What are the major characteristics of the international discourse of lifelong learning?

First, from the work of the chapter, it is seen that 'global change' demands lifelong learning. The discourse argues that the changes have been rapid and dramatic, and therefore, drastic measures have been required. Positioned as central to social reform, lifelong learning is treated as a leading policy in coping with such global change.

Second, from the work of the chapter, it is clear that the international discourse emphasises 'social justice'. Inequality and exclusion have become a serious issue globally, necessitating a change, from conventional educational systems which focus on formal schooling to flexible and open systems. Hence, a new, radical and attractive reform policy is required, and the current solution is lifelong learning. The international discourse defines a relationship: lifelong learning is a convincing means through which to realise social justice.

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[122] Schuller (1993) quoted in Edwards, *Changing Places? Flexibility, Lifelong Learning and a Learning Society, op.cit.*, p.59; OECD (1990) quoted in Tujinman, *op.cit.*, p.31.
[123] Albert C. Tuijnman, *op.cit.*
[124] John Dewar Wilson, 'Lifelong Learning in Japan: A Lifeline for a "Maturing" Society?', *International Journal of Lifelong Education*, Vol.20, No.4, 2001: 297-313, p.308.
[125] Richard Edwards, *Changing Places? Flexibility, Lifelong Learning and a Learning Society, op.cit.*, p.60.
[126] Malcolm Tight, 'Mythologies of Adult/Continuing/Lifelong Education' [http://www.leeds.ac.uk/educol/documents/000001021.doc], paper presented at SCUTREA 1999, page unknown.
[127] OECD, *Lifelong Learning for All*, *op.cit.*, p.31.
[128] Richard Edwards, *Changing Places? Flexibility, Lifelong Learning and a Learning Society, op.cit.*, p.58.
[129] *Ibid.*
[130] Peter Jarvis, 'Global Trends in Lifelong Learning and the Response of the Universities', *op.cit.*, p.253.
[131] OECD, *Lifelong Learning for All*, *op.cit.*, pp.29-31.
[132] UIE, *op.cit.*, Forward; Albert C. Tuijnman, *op.cit.*, p.31.
[133] OECD, *Lifelong Learning for All*, *op.cit.*, pp.39-40.
[134] *Op.cit.*, pp.29-31.

[135] John Field, *Lifelong Learning and the New Educational Order, op.cit.*, p.21.
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[137] Beck (1992) quoted in Jarvis, 'Global Trends in Lifelong Learning and the Response of the Universities', *op.cit.*, p.250.
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[142] Miriam Henry, Bob Lingard, Fazal Rizvi and Sandra Taylor, *The OECD, Globalisation and Education Policy* (Oxford: Pergamon, 2001), p.119.
[143] UNESCO, *Education for All, The Amman Affirmation* [http://www.unesco.org/education/efa/ed_for_all/background/amman_affirmation.shtml] (2001), page unknown.
[144] Ann Hodgson, 'The Challenge of Widening Participation in Lifelong Learning' in ed. Hodgson, *Policies, Politics and the Future of Lifelong Learning* (London: Kogan Page, 2000), pp.53-54.
[145] OECD (1996) and UNESCO (1996) quoted in Miriam Henry, Bob Lingard, Fazal Rizvi and Sandra Taylor, *op.cit.*
[146] Peter Jarvis, 'Globalisation, the Learning Society and Comparative Education', *op.cit.*, p.347.
[147] UIE, *Integrating Lifelong Learning Perspectives* [http://www.unesco.org/education/uie/pdf/uiestud36.pdf] (2002), p.xi.
[148] *Ibid.*
[149] *Ibid.*
[150] UIE, *Revisiting Lifelong Learning for the 21st Century*, [http://www.unesco.org/education/uie/pdf/revisitingLLL.pdf] (2001), p.7.
[151] *Op.cit.*, pp.7-8.
[152] UIE, *International Conference on Education 46th Session, Geneva, 5-8 September 2001* [http://www.ibe.unesco.org/International/ICE/pdf/cierapfine.pdf], p.16.
[153] UIE, *Revisiting Lifelong Learning for the 21st Century*, *op.cit.*, pp.11-13.
[154] UIE, *About UIE* [http://www.unesco.org/education/uie/institute/about.shtml] (2003), page unknown.
[155] UIE, *Revisiting Lifelong Learning for the 21st Century*, *op.cit.*, pp.14-16.
[156] *Op.cit.*, p.5.
[157] *Op.cit.*, p.7.
[158] OECD, *Lifelong Learning for All, op.cit.*
[159] *Op.cit.*, p.13.
[160] *Ibid.*
[161] *Ibid.*
[162] *Ibid.*
[163] OECD, *Education Policy Analysis 2001*, *op.cit.*, p.11.
[164] *Op.cit.*, p.89.
[165] OECD, *Starting Strong: Early Childhood Education and Care* (Paris: OECD Publications, 2001), p.3.
[166] OECD, *Lifelong Learning for All*, *op.cit.*, p.27.
[167] *Op.cit.*, p.15.
[168] *Op.cit.*, p.89.
[169] CERI, *Overcoming Exclusion Through Adult Learning, What Works in Innovation in Education Series* (Paris: OECD Publications, 1999), p.9.
[170] *Op.cit.*, p.21.

[171] *Op.cit.*, p.23.
[172] OECD, *Education Policy Analysis 2001, op.cit.*, p.7.
[173] OECD, *Introduction to DeSeCo* [http://www.statistic...ch/stat/ch/ber15/deseco/intro.htm] (2001), page unknown.
[174] OECD, *Education Policy Analysis 2001, op.cit.*, p.11.
[175] *Op.cit.*, p.7.
[176] *Op.cit.*, p.11.
[177] CEC (1997) quoted in CEC, *op.cit.*, p.6.
[178] CEC, *A Memorandum on Lifelong Learning: Commission Staff Working Paper* [http://europe.eu.int/comm/education/life/index.html] (2000), pp.6-7.
[179] CEC, *Making a European Area of Lifelong Learning a Reality: Communication from the Commission*, *op.cit.*, p.9.
[180] *Op.cit.*, p.3.
[181] *Ibid.*
[182] *Ibid.*
[183] CEC, *Making a European Area of Lifelong Learning a Reality: Communication from the Commission, op.cit.*, p.9.
[184] *Op.cit.*, p.6.
[185] *Op.cit.*, p.7.
[186] *Op.cit.*, p.9.
[187] *Op.cit.*, p.8.
[188] *Ibid.*
[189] *Op.cit.*, p.4.
[190] CEC, *A Memorandum on Lifelong Learning: Commission Staff Working Paper, op.cit.*, p.7.
[191] *Op.cit.*, p.9.
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CONCLUSION TO PART ONE: THE INTERNATIONAL DISCOURSE

Overall, the international discourse of lifelong learning can be characterised by its 'global change' and 'social justice' arguments. The first addresses the necessity for lifelong learning and the second refers to the benefits of lifelong learning. According to the discourse, lifelong learning can include the global population within learning, without discrimination, stratification and exclusion: the provision of fair opportunities for all and the widening of life chances for everyone is a justifiable use of public resources.

These themes have been repeated and reinforced throughout the 1990s in and by the international educational discourse. In other words, the discourse has made lifelong learning a discursive norm. As the analysis of the positions of the three international organisations has shown, lifelong learning is treated as a requisite to deal with a dynamically changing world. What makes it so important as a public policy is that it is a part solution to the multiple problems of the global economy, diversifying cultures and values, the diffusion of ICT and an aging population. Lifelong learning enables nations, organisations and individuals to adjust to these rapid and diversified changes. Given these necessities and benefits, lifelong learning is seen as 'a universal solution' for combating difficulties and problems which are common globally.

Yet, this international diffusion is only one aspect of the phenomenon of lifelong learning. It also has a local dimension. This study now turns to describe this feature by looking at the differing development of lifelong learning policies in England and Japan.

PART TWO: LOCAL POLICY CHANGE

The previous part examined the discourse of lifelong learning at the international level and pointed out that the discourse had normalised lifelong learning in terms both of its need and benefits. This study now turns to look into the cases of England and Japan. In this second part, the development of lifelong learning policies in each country is discussed. This is to investigate the genesis of the distinctive features of lifelong learning policy – in terms of their economic and social emphases – in the two countries.

As the lifelong learning policies moved into practice, the UK and the Japanese governments came to realise that the problems were not diminishing, but getting more serious. In response, lifelong learning policies were reemphasised and reshaped. The English lifelong learning policy – of which the central aim is skills development – derives from economic ends, focusing on the perceived weakness of the country, 'the lack of skills'; whilst the Japanese lifelong learning policy – of which the central aim is community building – derives from social aims and addresses the problems of '*gakureki shakai* [a credential society]'.

Part Two explains both processes. Chapters Three and Four examine the two formulations of these different lifelong learning policies in England and in Japan; and then Chapters Five and Six analyse what happened to the lifelong learning policies in the two countries after the initial years.

CHAPTER THREE REMEDIATION AND FORMULATION: ENGLAND

1. Introduction

There are two research questions which this chapter explores:

When and how were major lifelong learning policies formulated in England?
What were the strategies for the implementation of those policies?

In England, the current lifelong learning policy is in a large part the achievement of the Labour government since it came to power in 1997.[1] This chapter indicates, however, that the development of lifelong learning policy can be traced back earlier: that is, to the end of the 1980s when policy debate on the need for 'continuous skilling' began, and which led to the publication of the first consultative document on lifelong learning in 1995. This is the year when major lifelong learning policy was first formulated in England.

It is also suggested that the formulation was a process whereby the idea of lifelong learning was linked to a historical problem of the country as a remediation, which led to the policy-making of lifelong learning. This was made possible by a strong political leader who had a clear political ideology.

This chapter goes on to suggest that the UK government undertook the strategy to involve employers in implementing lifelong learning policy.

The second section of the chapter examines how the problem of skills shortage was linked to the idea of lifelong learning in England. This is followed by an analysis of the formulation of lifelong learning policy. The fourth section looks at the strategy for policy implementation. The chapter is summarised in the fifth section.

To begin with, the chapter looks at how the notion of lifelong learning became a remediation policy in England.

2. Remediation Policy

The perception that education and training produces a skilled and qualified workforce which contributes to the success of the economy has been widely accepted in England. This logic led to the emphasis on solving the skills shortage of the country. The idea of lifelong learning, as this section suggests, became a remediation policy for skills shortage. How that happened is described in this section.

It should be noted, however, that the country had had a long history of education for adults. A brief sketch of this history will be helpful in understanding the emergence of lifelong learning policy.

In England, the emergence of education for adults was strongly related to the rise of radicalism which led to radical middle class movements for enlightenment at the end of the eighteenth century.[2] Quite a few societies were founded for the middle class: the Lunar Society and other literacy and philosophical societies, scientific societies such as the Geological Society or the Royal Botanic Society and non-specialist societies which offered general study such as London Institution or Russell Institution.[3]

The working class adult education movement started later – in the 1820s, largely centred on the skilled, with funding support from the middle class.[4] Following the foundation of the mechanics' institutes in Glasgow and Edinburgh by Dr George Birkbeck, the London Mechanics' Institution was established in 1823, with Birkbeck as its first president. The

significance in the policy of the Institution was the realisation of self education and self government of the working class. The Institution declared its objective as "the instruction of the Members in the principles of the Arts they practise, and in the various branches of science and useful Knowledge",[5] and offered a variety of subjects.[6]

Mechanics' institutes stand as the dominant form of working-class adult education in the first half of the nineteenth century, but gradually many workers began to leave the institutes because they wanted more relaxing subjects like literature.[7] Simultaneously, trade unions were emerging. As Kelly indicates, "trade unionism, co-operation, and political radicalism were all facets of the same movement"[8] inspired by Owen's utopian socialist ideals.[9] Out of this movement, the London Working Men's Association – a successor of the National Union of the Working Classes – was founded in 1836.[10]

By the mid nineteenth century, the weakness in working-class adult education was recognised, and new institutions were established.[11] The London Working Men's College was founded in 1854. Based on the principles of Christian Socialism,[a] it was expanded by a group of professional and academic people who were concerned with an unchanging gap between the middle and working classes.[12] For the first time in the history of English adult education, the Working Men's College movement made the distinction between technical and liberal education,[13] offering a new notion that adult education should provide not mechanical "information" but "the enrichment of

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[a] Its purpose was to raise the status of all men and to unite all classes in the pursuit of higher spiritual ideals.

personality".[14]

The second half of the nineteenth century was "the golden age of British capitalism",[15] and the change in education was also remarkable. Technical education developed in various forms at various levels with new institutions such as the Society of Arts and the City and Guilds of the London Institute, which absorbed existing institutions, e.g. mechanics' institutes, co-operative societies.[16] The radical strain in adult education which was influential at the beginning of the century had largely disappeared by the middle of the century,[17] but in the 1880s, utopian socialism under the Marxist influence of the Social Democratic Federation was re-emerging. This brought the formation of socialist and labour political parties, and organisations of the working class were increasing. Mass trade unions were organised for unskilled workers and the Trade Union Congress and the Co-operative Union, both founded in 1868, were strengthened. The new mass labour market, consequently, developed a variety of informal educational organisations.[18]

Another major movement during the second half of the nineteenth century was University Extension which started at Cambridge, and was later followed in Oxford.[19] The University Extension movement was significant for adult education in a sense that, for the first time, attention was paid to the needs of women. Moreover, at a time when many adult education movements were emphasising technical and vocational education, the University Extension movement emphasised a liberal approach.[20]

Adult education movements continued to develop in the new century. In 1903, the

Association for the Higher Education of Working Men (the Workers' Educational Association (WEA) from 1905) was founded.[21] The emergence of local education authorities (LEAs) contributed to the advancement of adult education and the work of the WEA in particular. The Education Act of 1902 gave greater responsibilities to the LEAs in the arrangements of adult education and prompted adult education development, making both government grant and local authority aid available.[22]

The inter-war period saw two major developments: first, there was a dramatic increase in state aid, and second, a variety of forms of adult education were assimilated into a common pattern. These changes were brought about by the recommendations in 1919 of the Adult Education Committee, which stated that a much larger expenditure of public funds should be on adult education, that universities should play a leading role as a provider of liberal education for adults, that each university should set up a department of extra-mural adult education and that LEAs should establish evening institutes for social, recreational and educational activities. This recommendation was and has been one of the most important recommendations in the history of adult education in England.[23]

These developments were strengthened in the 1945 post-war period. Influenced by the social transformation towards "the welfare state" and "the affluent society", which meant an increased income, reduced working hours, smaller families or longer living, adult education came to provide leisure courses.[24] This was an expansion of liberal adult education.

During the 1970s, variation in the provision of adult education and training developed. Liberal education programmes continued to be run by LEAs, non-governmental

organisations and university extramural departments. At the same time, apprenticeships for young people, short-term training programmes and adult literacy courses were offered by various providers.[25] In 1977, the Advisory Council for Adult Continuing Education was set up to develop policies on education and training for adults.[26] In the 1980s, the tradition of liberal adult education was taken over by vocational training,[27] which characterised a large part of education and training throughout the 1980s.[28] This was where 'lifelong learning' came in.

Thus, despite the tradition of adult education, the impetus of the policy debate on lifelong learning did not emerge until the end of the 1980s in England.[29] The Manpower Services Commission (MSC),[a] which had been in charge of the policy-making of vocational training, was at its "zenith"[30] in the mid 1980s. In the second half of the 1980s, the MSC and the National Economic Development Council conducted one of the most influential policy studies of vocational education and training at that time by investigating the Federal Republic of Germany, the United States and Japan. These countries were chosen because they were considered as "Britain's major competitors in the world markets" but were more economically successful than Britain.[31] In the Report, *Competence and Competition: Training and Education in the Federal Republic of Germany, the United States and Japan*, vocational education and training, and the economy were linked, leading to the assumption that education and work competence were key to economic success.[32] Vocational education and training was defined as: "learning activities which contribute to successful economic performance".[33]

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[a] Ten members were in the Commission: a chairman, three members appointed after consultation with the Trade Union Congress, three after consultation with the Confederation of British Industry, two after consultation with local education authorities and one with professional education interests.

The Report illustrated the lower economic competitiveness of the UK relative to the other three competitors mentioned above. For example, the data on the supply of professional engineers, which is regarded as "essential to economic progress", showed that the UK's output was lower than in the other three countries; adequate education in the 3Rs was failing; "the figures point to deficiencies in initial provision of ET [education and training] for young people".[34] The report concluded that: "The UK's goal must be to ensure that large numbers of young people no longer attempt to enter the labour market without a qualification."[35] The weakness of the country's education and training system was highlighted.

From the research findings, 24 recommendations were made "to compete effectively".[36] The recommendations were addressed not only to government, but also to industry, employers, agencies and individuals. The overall tone of the recommendations required urgent change in the learning culture: responsibility should be shared between the government, providers and learners. There was a need for a qualification system which led to employment, for a training scheme which focused on occupational competence and for employees who had both the ability to learn and the habit of learning.[37] From this point, these notions of a 'learning culture' – hitherto unfamiliar – came to be recognised, and this led to the development of lifelong learning policy.

After this influential research, the government published *Education and Training for Young People*, which stressed the new recognition that: "vocational education and training are not marginal activities, but are central to our economic growth and prosperity".[38] Targeting young people between fourteen and eighteen years old, the White Paper referred to the importance of "a foundation":

> Young people in the United Kingdom are not provided with as good a foundation for the continuing education and training in adult life which must be an increasingly important feature of modern economies. . . . unless we move further ahead the United Kingdom still has relatively little prospect of creating the highly skilled and innovative workforce required to meet the employment needs of the existing and new technologies.[39]

The White Paper went on to point out that in comparison with other countries, vocational education and training provision was underdeveloped and employers contributed less to the area.[40] The deficits of the country were reemphasised. To change these circumstances, the government set the following objectives: first, to produce qualified young workers that can meet "the skill requirements of a modern economy"; and second, to qualify all young people before they enter the labour market.[41] Aiming for a systematic and coherent system of vocational qualifications to pursue these objectives, the government set up the National Council for Vocational Qualifications (NCVQ) in 1986. The Council created a framework of National Vocational Qualifications (NVQs) which included eleven occupational areas which were classified into five levels. NVQs were aimed to be "a statement of competence clearly relevant to work and intended to facilitate entry into, or progression in, employment, further education and training". The Industry Training Organisations were also founded to develop the standards of NVQs.[42]

By the end of the 1980s, thus, there developed a firm perception that high skills lead to secure employment, better earnings and 'quality of life' for individuals and that a high-skilled workforce leads to national economic growth. 'Skills shortage' became a common agenda for employment and education; therefore, the government approach became the involvement of industries in fostering a more skilled and qualified workforce. In other words, vocational training was no longer an issue confined to young people. Obtaining and updating skills became a prerequisite in adult life. This notion of 'skilling

throughout life' was the impetus for 'lifelong learning', as pointed out by the Director General of City & Guilds, Humphries[a] and a retired DfES official, Taylor.[43] Although the actual term 'lifelong learning' was not used, "the need of skills for everybody throughout life" was now being promoted and implemented.[44] Policy-makers welcomed the idea of 'learning throughout life' as linked to fixing a deficit – the lack of skills. Thereafter, continuous training for both young people and adults became the central theme of policy debates in both the Department of Education and Science and the Department of Employment. The emphases on employers' involvement, individual choice and commitment, and competitiveness from an international perspective were iterative.

The private sector was beginning to respond. Admitting employers' failure to invest in employees' training, the Confederation of British Industry (CBI) tried to bring about "a skills revolution by improving the foundation skills of young people as a basis for continued learning throughout working life, and by urging all employers to become 'Investors in Training' for all their employees, young and adult".[45] The CBI created the World Class Targets in 1991 in which 78 organisations agreed to realise the skills revolution, aiming to raise education and training performance. Two major objectives of the targets were to ensure all young people up to the age of 18 were either in education or employment with training, and to make training a priority for all individuals and employers, which was called "a lifetime learning target".[46] A few years later, the CBI introduced an idea of "a skills passport", which was a system for recognising workers' qualifications and experiences. Once again criticising the "too low" and "time expired" skill level of the UK workforce, the CBI proposed 'a skills passport' could help with getting a first job, turning a

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[a] Chris Humphries was the Director of Policy, TEC National Council, the Chairman of the National Skills Task Force and the Director General of the British Chambers of Commerce.

job into a career and moving "successfully from one phase to another".[47] Responding to the pressure from the government, some employers began showing their commitment to training, with many industries coming to recognise the urgent need for action.

The demand for continuous skilling did not only rise from domestic interest. There were also international influences, particularly those from Europe. In the European context, the importance of education and vocational training was recognised from the end of the 1970s. The European Trade Union Confederation, for example, held a congress on education and training in Europe in 1979 and published a policy document in 1984.[48] Indicating that 11.5 percent was the average unemployment rate in Western Europe, the policy prioritised youth unemployment, focusing on the transition period of the age of fourteen to nineteen[49] and the need for constant development of professional skills and qualifications.[50] It can be seen that these priorities set by the EU were, to a certain extent, reflected in the domestic policy of the UK.

These themes were reinforced by the establishment of the European Union (EU) in 1992 which made each Member country affirm its political position in the context of Europe.[51] European integration implied the need to increase economic competitiveness in the individual Member countries. "The Single European Market" meant the free movement of workers, the emergence of many new jobs, the need for mutually recognisable qualification systems and the need to ensure workers access to social security and taxation benefits.[52] In the UK, however, weakness was persistent:

> Britain is now operating in an increasingly competitive international environment where many markets are 'knowledge-based'. . . . the move towards . . . the Single European Market in 1992 will open up to British business a market of over 320 million consumers. Most of the other major European Community countries have prosperous economies with higher incomes per head than the UK, . . . and they are themselves tough competitors in British markets.[53]

Furthermore, it was feared that there were "powerful new economies" in South East Asia which could challenge Europe and its markets. These Asian competitors were known for their strategy of large-scale investment in education and training. The UK government acknowledged the importance of the notion of investment in tackling "knowledge markets" and adjusting to changing market demands.[54] The effective and efficient use of skills and abilities of the people to meet these demands was emphasised as the key to "success".[55]

Thus, the UK government tried to use post-compulsory education and training as a support for the recovery and development of the economy, and this was connected to the notion of 'learning throughout life'. The English workforce which was "less skilled, less flexible and less qualified than its international competitors"[56] was tackled but not much improved. A need for the skilling, reskilling and upskilling of adults as well as of young people was recognised. 'Lifelong learning' was, therefore, mainly translated into vocational training for the post-16 population to increase the economic competitiveness of the country.

In the context of such anxieties, in 1995, the Conservative government compiled the English version of 'lifelong learning' in a consultation document, *Lifetime Learning*. This was the first time the term has been officially used by the government. The document did not define 'lifetime learning'; however, the interpretation and positioning of the term was straightforward, based on the previous debates: "Creating a culture of lifetime learning is crucial to sustaining and maintaining our international competitiveness."[57] Therefore, further skills improvement after compulsory education is necessary for both young people and those already in work: "This must happen if skills are to remain relevant, individuals employable, and firms able to adopt and compete."[58] The commitment of employers was a precondition. Classifying 'skills' into "general educational attainment", "job-specific

skills" and "transferable vocational skills",[59] the document reinforced the link between skills and work. 'Lifetime learning' was used as an equivalent to continuous learning, after compulsory education, mainly to update skills for the purpose of economic productivity. The creation of the Department for Education and Employment in the same year[60] was both a means to and an end of actualising an economic policy – 'lifetime learning'.

Thus, the decade's discussion on the need for 'continuous skilling' has resulted in the first substantial document on lifelong learning policy. Hence, to answer to one part of the first research question – *when were major lifelong learning policies formulated in England?* – this study suggests that it was 1995.

However, the other part of the question – *how were major lifelong learning policies formulated in England?* – has not yet been addressed. As this section has illustrated, it was in the second half of the 1980s when the notion of 'continuous skilling' evolved, and it was substituted for 'lifelong learning'. The aim of the government was to remediate the skills deficit of the country. But the perception behind the notion that the country had a skills deficit and that education was a determinant for economic performance had existed for many years. For the purpose of understanding how 'lifelong learning' came to address 'continuous skilling' as a remediation policy, the relationship between 'skills', 'education and training', and 'the economy' should be explored more in detail.

One of the writings which straightforwardly pointed out the weakness of the country and its link with the economy was *The British Disease* written by Allen in 1979. He argued that there was dissatisfaction with England's relative economic decline in the post-war period,[61] claiming that education and training were one of the factors of economic

performance. 'The British Disease' was, however, not chronic. The 1950s and the 1960s recorded the highest rate of economic growth in the previous 50 years, and that led to a rise in the standard of living, although compared with other European countries, relative decline continued in those years. This period was called "an era of social consensus",[62] "Welfare Capitalism", "Fordism" or "the thirty glorious years".[63] The economic situation was in "the long boom", which actualised a 1.5 percent unemployment rate till the end of the 1960s. There was a "secret weapon of a society of *popular* affluence, namely full employment".[64] The issues of skills deficit did not matter during the full employment years.

Circumstances changed after the first Oil Shock in 1973,[a] which led to economic recession and the decline of youth employment. The MSC provided employment schemes such as the Youth Opportunities Programme.[65] However unemployment persisted and the schemes were not sufficiently effective to improve the state of the economy.[66] In his 1976 Ruskin College speech, the then Labour Prime Minister Callaghan "redefined the purpose of education" by blaming schools for not making enough links between education and employment and contributing to youth unemployment. "'Relevance to the world of work' became the new watchword for schools."[67] After the Conservatives came to power, Margaret Thatcher succeeded in expanding the idea. Training schemes for all school leavers, employed or unemployed, and retraining for all adults were planned: e.g. the New Training Initiative.[68] Nevertheless, youth unemployment was becoming a continuing problem.[69] One newspaper article argued that:

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[a] "When the Arab oil-producing countries took the decision to quadruple oil prices at the end of 1973, they caused changes in the world economy (Beasley, 1995, p.249)."

> The less obvious peril of unemployment is the whole generation of working class young people. It is a loss of the habit of work – a result that is not unthinkable if a young man moves from a not particularly inspiring education to a dole queue, with a brief intermission in a work experience programme that does not lead to a job.[70]

However, formal schooling and youth schemes were successful neither in the development of broader skills and knowledge,[71] nor in employment.

Moreover, England's economic performance became inferior to that of some other rival countries.[72] In comparison with other European countries, the UK unemployment rate was higher: 13.8 percent in 1983, compared with, for example, 9.1 percent in West Germany.[73] The high unemployment rate in the UK was explained as being due to the rapid decline in the whole industrial world, which resulted in economic recession in the face of intense foreign competition including that of Third World countries.[74]

The poor provision and achievements of youth training in the UK was pointed out as well: "A league table, based on the provision of continuing education and training for young people, showed the United Kingdom at the bottom."[75] In many other European countries, more than 50 percent of young people entered apprenticeship schemes, but in the UK, only 14 percent did.[76] The UK was distinguished by the low level of qualifications of its labour force.[77] As a consequence, its "relative economic decline"[78] had become impossible to ignore. The rise of unemployment during the1970s and the collapse of the youth labour market in the early 1980s led to the conclusion that economic growth largely depends on the delivery of education and training.[79]

The theory of "a low-skilled equilibrium",[a] which was introduced by Finegold and Soskice,[80] offered a clear explanation about 'the failure' of the training system in Britain. Their argument is that it stemmed from poor training systems for both managers and workers, which led to the majority of companies producing low-quality goods and services, and resulted in poor economic growth during the post-war period.[81] Admitting the lack of empirical evidence on the correlation between education and training, and economic productivity, Finegold and Soskice elaborated the argument:

> first, that the short-term expansion of British industry has been hindered by the failure of the ET [education and training] system to produce sufficient quantities of skilled labour; and second, that the ability of the British economy and individual firms to adapt to the longer-term shifts in international competition has been impeded by the dearth of qualified manpower.[82]

The reasons for the neglect of 'the market's inability to provide enough skilled workers' are, according to Finegold and Soskice: first, political parties' reluctance to intervene in the training, but at the same time, the weak central bureaucracy in both education and training. Culturally, the position of technical education was marginalised. Industrial structure mattered as well: the argument was that a number of companies have been in those product markets which require the lowest skill; the majority of young workers have been hired at the end of compulsory education; the failure to broaden workers' skills and knowledge after their joining a company; the responsibility of training decisions is often on line managers, not top executives; the incentive to pursue training is low because wages and promotion are determined by seniority; and managers are not usually educated in technical higher education or management schools.

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[a] According to Finegold and Soskice, the term 'equilibrium' refers to: "a self-reinforcing network of societal and state institutions which interact to stifle the demand for improvements in skill levels". The network includes: "the organization of industry, firms and the work process, the industrial relations system, financial markets, the state and political structure and the operation of the education and training system".

There was also pressure to maximise short-term profits and shareholder value, and that has influenced British firms' investment in training. In terms of industrial relations, the "voluntary, free-market approach" of the CBI – the employers' organisation – left the industry without any substantial solution to the problem. Equally, the Trades Union Congress – the central union federation – lacked the means for reaching centrally negotiated initiatives.[83]

Since Finegold and Soskice's analysis, the concept of 'a low-skilled equilibrium' has become the established view of the British labour force, and 'employers' have often been questioned for the 'failure' because of their neglect of training.[84] From the perspective of skill formation, Ashton and Green dig deeper for the source of the weakness and classify the UK "a low-skill route".[85] It is suggested that historically, the ways in which the state formation process conditioned the formation of the system of education and training were a major factor. Industrialising on the basis of poorly educated working classes, the UK did not develop a national education system based on the demands of the economy at the time of industrialisation.[86] The UK does not fulfil "the national institutional requirements" for a high-skill route to "accumulation".[87] These requirements are: the commitment of ruling political elites and employers to a high-skill route; an education system which produces leavers with basic competence;[a] an adequate regulatory system of workplace training; sufficiently developed education and training systems for workers providing for continuous education and training at work; and a complementary system of both work-based learning (on-the-job) and a knowledge base of skills (off-the-job) in the

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[a] At least, intermediate levels of qualifications in language, science, mathematics and information technology.

workplace.[88] The wide acknowledgement has been that 'the British Disease' largely derived from "low productivity, lack of product innovation", "poor take-up of new technology", "poor management and short-term attitudes towards company profitability" and the neglect of investment in training.[89]

These analyses probed the causes of England's skills deficit in post-war political, industrial and educational 'systems': i.e. ineffective state intervention, absence of in-company training and the unorganised vocational training track. However, the root of the deficit has to be traced back further to the nineteenth century, as Allen argued in *The British Disease.* The purpose of 'education' was forming elites for Britain as an "Imperial Power". Public schools were designed to form self-confident elites who could become rulers of the world but not leaders who could manage Britain's economy. This was the same in universities; vocational training was not treated as a function of a university.[90]

Putting an emphasis on the classics, the English education system made light of science and technology; in other words, there was no system for industrial and technical education for masters and managers.[91] The notion that "education is only for elites" led to the neglect of training. As Ashton and Green indicate, the mass of poorly educated workers was scooped into the industrialisation processes without the provision of substantial training. Thereafter, the English labour force is divided into "a small highly educated elite" and "a large mass of relatively poorly qualified leavers",[a92] or the division

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[a] For example, Maguire's statistical data summarised in 1991 showed that just over half the young people leave school at the minimum school-leaving age of 16 in the UK, whereas 85 percent of all 16-year-olds were in full-time education in Canada, the US, Sweden and Japan: the figures of the UK of 1986 were, of the total school-leavers, only 54 percent achieved passes in O-levels or their equivalent; 45 percent stayed on in education; of the remainder, 27 percent entered Youth Training Scheme, 13 percent were unemployed and 15 percent were in employment (p.48).

of labour between "the middle class" and "the working class"[93] has been a common perception.

Thus, skills deficit derives not simply from the economic recession after the Oil Shock or through systematic faults. England's weakness is a deep-rooted one which dates back to the nineteenth century. The nineteenth century legacy has been the logic that education and training determine the level of skills, which results in economic performance. The historical skills deficit is still a priority agenda for the country.

More investigation has been made into the root of the problem in this area. One of the examples is illustrated by Steedman: revisiting 'the market failure' question and specifying that the core of the failure results from the fact that "the supply of and the demand for skills are not in equilibrium".[94] The most serious and persistent skills shortages are those of sixteen to nineteen year olds without qualifications at "the technician/associate professional level". The government has been putting in money to overcome 'the market failure', but in terms of the 16-19 sector, the efforts have not been fruitful. This largely stems from "multiple information failure", i.e. the lack of a transparent linkage between institutions and employers, perverse funding incentives and the lack of 'parity of esteem' between academic and vocational tracks.[95] Steedman's contribution is the identification of what actually "the lack of intermediate skills" addresses.

The weakness in the British economic performance can be understood by focusing on industrial characteristics. Green considers that the current damage to British industry stems from another kind of legacy of the nineteenth century. "The lack of effective

government intervention" and "the dominance of financial interests"[a] can be traced back to the "power of the City" during the nineteenth century. Also, one possible explanation of the lack of "dynamic corporatism characteristic of more successful economies" is due to "liberal values of individualism and political laissez-faire".[96] Thus, the weakness of the economy itself can be explained in many ways, but what this section has aimed to indicate is the link between skills, education and training, and the economy, which has been deep-rooted in English society since the nineteenth century.

This perception was, as has been indicated, projected onto the interpretation of the idea of lifelong learning, which focused on an economic agenda. The consultation document, *Lifetime Learning*, was significant in its stipulation of the official position on lifelong learning, i.e. continuous skilling, even though the contents were a repetition of previous arguments. As a remediation policy, lifelong learning policy directly addressed the weakness of the country's education and training – skills shortage – in the pursuit of economic recovery and development.

The linking of the idea, lifelong learning, with the long-standing problem, skills shortage, was an important element of the process of the formulation of the remediation policy. However, such linking still does not complete the process. There was a political force which made the formulation possible. This is examined next.

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[a] British companies are dominated by accountants and pursue "short-term financial dividends". This is "due to the unregulated power of shareholders, the ease of mergers and take-overs and the lack of the kind of long-term financial partnerships with banks which are typical of German and Japanese firms".

3. Policy Formulation

This section suggests that a strong political leadership contributed enormously to the formulation of lifelong learning policy. That strong political leadership involved a political ideology (neo-liberalism) and a political leader (then Prime Minister Margaret Thatcher). The main principles of neo-liberalism – privatisation, marketisation and individualisation – fitted well with the idea of lifelong learning.

For most of the post-war period, both Labour and Conservative governments had regarded state intervention in economic management and the state's role in the provision of welfare as necessary. "Nationalisation" through, for example, subsidies or the manipulation of prices and income controls was undertaken in certain sectors of the economy, so that full employment could be maintained. The state was to play the role of partner to the private sector of the economy. The state also tried to provide every citizen with "a basic entitlement" such as health care, housing and education. However, by the mid 1970s, the "Welfare State" was under strain from the expansion of expenditure. Despite the involvement of the private sector, the dominant feature was state provision: e.g. in the National Health Service, "council" housing, pensions and social security, secondary, further and higher education.[97]

When Thatcher came to power in 1979, whether the state should play a central role in the provision of social and welfare services was questioned. Her government was convinced by the neo-liberal perspective that "the market is by far the best mechanism for producing and distributing resources".[98] 'The market' was seen as superior to state-run or state-regulated mechanisms because of its efficiency and responsiveness to public needs and therefore its productivity.[99] As the slogan, "rolling back the state" indicates, the policy-making for the public sector aimed at deregulation and

encouragement of free competition.[100] Also, "rolling back the welfare state" meant an emphasis on individualism. The argument was that the state should stay away from individuals' lives as well as economic affairs; therefore, individuals should be responsible for themselves. "The post-war welfare state had damaged individual self-responsibility; it was to be the task of government to rekindle that individualist ethos."[101] With a strong initiative taken by the Thatcher government, neo-liberal principles were reflected not only in economic policy, but also in social policy.

Thatcher's radical programme was referred to as "Thatcherism", a new perspective and strategy for the Conservatives combined with the continuation of certain traditions of the party.[102] According to Gamble, Thatcherism had "all of consistency of a 'project' to restructure Britain",[103] which had three key propositions. First, the public sector is an unproductive burden. The reduction of public expenditure to cut tax helps the revival of private enterprise, the regeneration of the capitalist class and the restoration of family and individual responsibility. Second, firm control of money supply which is the government's responsibility maintains price stability. Third, the role of the government is to maintain the conditions for markets to function properly.[104] Thatcher's neo-liberal "orthodoxy" in economics stood on the principles that: "inflation should be controlled by the interest rates, preferably by an independent central bank"; "budgets should be balanced and not used to influence demand – or at any rate not to stimulate it"; and unemployment is "solely" a problem of the labour market.[105]

Kavanagh considers that in Thatcherism, the privatisation programme which was about both denationalisation and liberalisation had the largest impact: "The privatisation policy was consistent with the Prime Minister's belief that there should be a major diminution in state intervention in the economy and greater reliance on the free market".[106] The

purpose was to promote deregulation and competition in the economy.[107] The other part of the belief was that "the publicly owned industries were inefficient and an obstacle to the creation of a more dynamic and adaptive economy".[108] Control of public spending was crucial to government's strategy because it wanted to cut governmental borrowing and taxes.[109] The general view of the Thatcher Administration was that it was up to employers and individuals to identify what they saw as skill needs and to find out how to cope with them and, therefore, the government was not to intervene and statutory involvement should be reduced.[110]

Nevertheless, as Kavanagh points out, there has been a "remarkable centralization of decision-making since 1979" despite the Conservative agenda of 'rolling back the state'.[111] Despite neo-liberal principles of commitment to the market and individualism, there was strong leadership, which was often referred to as a 'firm' or 'resolute' government.[112] It could be identified in various ways: for example, a campaign for "law and order", a patriotic approach to international affairs and a confrontational, not consensual style of government.[113]

One of the outcomes of Thatcher governments' neo-liberal politics was the worsening of unemployment.[114] The main characteristics of unemployment in the 1980s were first, the country had its highest unemployment rate of 13.1 percent in 1985, second, young people in particular experienced great difficulty in finding jobs throughout the 1980s and third, unemployment was long-term.[115] Again in the early 1990s, the economy contracted, and the unemployment rate rose dramatically. The suddenness and size – three million unemployed people[116] – of the recession was unexpected by government and people alike. The government was forced to focus on reskilling the unemployed and bringing them back to work. By the end of the 1980s, the idea of learning throughout life

and learning for all was emerging, but that concept faded,[117] and 'lifelong learning' was simply treated as a better way of referring to vocational training. As a retired DfES official, Taylor, indicates, the Conservatives were caught up in solving the recession, i.e. how to bring a huge number of the unemployed back into employment. The immediate need was to solve the crisis of three million unemployed.[118] Lifelong learning became a remediation strategy, being framed as continuous skilling, stressing involvement of employers and individual responsibility. Lifelong learning was suitable to these neo-liberal principles. What triggered the adoption of the idea, lifelong learning, was therefore, the economy.

The stress on continuous skills upgrading for everyone, which led to the formulation of lifelong learning policy, largely derived from Thatcher's neo-liberal politics. Previously, however, there had been a contribution from a policy-making body of vocational education and training – the MSC – which had developed the link between the idea, 'lifelong learning', and 'the lack of skills'. The MSC recognised the skills deficit, skills gaps and skills needs, not just for elites but for everyone and not for once and for all but continuously. A brief sketch of the MSC's historical background is therefore worthwhile.

The MSC was set up by the 1973 Employment and Training Act of the Conservative government. The MSC was a large-scale project, aiming "to remake the entire basis of Britain's education and training system".[119] The MSC was directly responsible to the Secretary of State for Employment, and the Secretary of State for Education and Science was also involved in the debate and approval of the plans made by the Commission.[120] However, the role of the MSC was "indeterminate" because of the ambiguous nature of the 1973 Act. It was "a compromise" between state "intervention" derived from TUC demands for the national co-ordination of training and "labour market policy" promoted

by certain employers.[121] Set up within the Department of Employment and staffed by the civil service, the MSC was not an independent body, but in a complex tripartite link between the government, employers and trade unions.[122]

The major objectives of the MSC were: first, "to safeguard the provision of skilled manpower for industry's present and future needs"; "to move towards a position where all young people under the age of 18 have the opportunity either of continuing in full-time education or of planned work experience combining work-related training and education"; "to offer an efficient and cost-effective employment service whose facilities are easily accessible to employers and job seekers"; and "to offer a range of services to help those job seekers who have particular difficulty in obtaining suitable work or training".[123] To sum up, according to Ainley and Corney, the "ultimate ambition" of the MSC was to establish "comprehensive manpower policy" – i.e. "employment policy", "training policy", "manpower planning" – integrating "historically uncoordinated labour market policies" to improve the efficiency of the labour market.[124] This was a corporatist approach.

Ainley and Corney divide the history of the MSC into two phases. During the first phase, which was between 1974 and 1979, the MSC aimed to achieve comprehensive manpower policy with "an overall interventionist strategy". The MSC – as a tripartite committee – was a national training agency.[125] However, there was a struggle because of some incoherence in the strategies amongst the two agencies of the MSC, the Employment Services Agency and the Training Services Agency, and the major programme which was implemented, the Youth Opportunities Scheme.[126] A comprehensive state-led training policy was proclaimed, but there was a "crisis of mounting unemployment", which had to be tackled first.[127]

When Thatcher came to power in 1979, at the beginning of the second phase, "the MSC had acquired the potential to tackle training and employment policies in tandem".[128] The MSC played a leading role in developing the policies for implementing vocational training. "The MSC provided the state with a very strong arm of intervention, acting as a direct lever on the expectations and attitudes of Britain's workforce, employed and unemployed alike."[129] The quango had begun by concentrating on the policy-making of youth training, but gradually, the need for adults' skilling and reskilling throughout life was acknowledged, which contributed to the development of notions of continuous skills upgrading and an impetus for lifelong learning.

The abolition of the tripartite and corporate MSC was a consequence of the Thatcher government's determination about the introduction of market principles, i.e. neo-liberalism.[130] The MSC functioned as "a transitional phase"[131] for "a training market".[132] In 1988, a shift began. Aiming to involve employers more in training, the government established a new manpower authority which was only responsible for 'training', i.e. the Training Commission. The shift meant the employment service was placed in the Department of Employment.[133] The Training Commission, however, was soon renamed 'the Training Agency' as the government became impatient with trade unions' growing "obstructionism"[134] against the policies of Employment Training.[a] The Training Agency did not last long either; its replacement with a new national training arrangement, the Training and Enterprise Councils (TECs), began in 1988.[135]

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[a] Employment Training was aimed to be "an initiative for the long-term adult unemployed which would combine all existing adult training programmes into a single unified scheme (Brendan Evans, 1992, p.105)".

Thus, the MSC's development of the notion of 'continuous skilling' played a part in the emergence of policy debates of 'lifelong learning'. When neo-liberal policies came into action, e.g. through the setting up of TECs, 'lifelong learning' came to be seen as a synonym for 'continuous skilling'. More emphasis on the involvement of employers, based on neo-liberal principles of marketisation, privatisation and indivisualisation, sat well with 'lifelong learning'.

Thatcher's ideology was taken over by John Major when he took office. He soon emphasised the equal importance of vocational training to academic study.[136] The most significant change was the merging of the Department for Education and the Department of Employment. "Bringing together education, training, and employment in one Department allows Government to help improve competitiveness by integrating policy in these areas."[137] The DfEE was in fact, a kind of Department that the Thatcher governments had aimed for. The combination of education and employment was to strengthen qualification frameworks, work-based training and key skills at all ages. 'Lifelong learning' was maintained as an idea for individuals to learn throughout life "to keep abreast of change and meet the needs of the flexible labour market",[138] and for employers, to support their employees' reskilling. In 1993, the government established Investors in People (IiP) UK to give national ownership and business leadership to the IiP Standard. The Standard is a national quality standard which sets a level of good practice for improving an organisation's performance through its people. The framework for employers was to make a direct link between their investment in training and development and the achievement of business outcomes.[139] What the Thatcher government initiated was put into practice by the next generation.

State intervention was kept to a minimum. Identifying the lowest ratios of public spending

to the Gross Domestic Product (GDP) in Europe, a 1996 White Paper showed the continuing aim to be to reduce public spending to below 40 per cent of GDP. The belief was that "low levels of public spending give the private sector more room to create wealth".[140] The neo-liberal ideology established by the Thatcher governments and adopted by the later Conservative administration emphasised market principles, economic competitiveness, involvement of the private sector and individual responsibility. Lifelong learning was fitted in with this neo-liberal ideology.

Thus, in England, the major factor leading to the formulation of lifelong learning policy in 1995 was the process by which the long-standing problem of the country – skills shortage. The solution was lifelong learning as a remediation, with the ascendancy of clear political leadership – a solid political ideology, neo-liberalism, and supported by a strong political leader, Thatcher. Deriving from tight national finances, a neo-liberal approach to economic affairs and social services was dominant, and lifelong learning played a role in neo-liberalism.

The government took some action towards implementing lifelong learning policy based on neo-liberal principles. Particularly, the involvement of employers became a central strategy. The next section discusses the second research question: *What was the strategy for the implementation of lifelong learning policies?*

4. Implementation Strategy

This section suggests that the UK government aimed to enhance the participation of the private sector, aiming at a smooth implementation of lifelong learning policy. This was to make the sector aware of their responsibilities and to expand their involvement in policy-making and policy practice in vocational training.

The establishment of Training and Enterprise Councils (TECs) [a] was a radical implementation of neo-liberal policies. Thatcher governments intended to shift control over training to employers,[141] closing the MSC which had played a leading role in training policy-making and practice. In other words, this was a shift from a corporatist approach to neo-liberal approach which liberalised tripartite training policies. In 1988, the Department of Employment issued an important White Paper, *Employment for the 1990s*. It was argued that "demography", "global competitive forces" and the "changing nature of employment itself" were the factors in the 1990s which would change the labour force and work structures, and therefore the ways of making policy for employment.[142] "Success in creating wealth and jobs can only be sustained if the labour market and the training system respond smoothly and flexibly to the challenges and opportunities which lie ahead." [143] The strategy of the Thatcher government became one of increased responsibility on the part of employers:

> Employers will have to adopt different approaches to training, recruiting and managing their workers as the composition of the workforce alters. Individuals will have to develop new and different approaches to jobs and to working life as the structure and pattern of employment is transformed. More and more it will be in individuals' interest to take charge of their own career development and see that they acquire the right balance of skills.[144]

TECs were one of the measures introduced in the White Paper to adapt to the changing demand for skills of the coming decade.

The new strategy was to relate the delivery of training and its links with small enterprises to the circumstances of each local area. Reducing the influence of trade unions and

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[a] The function of TECs is taken over by the Learning and Skills Council in 2001.

stressing the role of employers through the establishment of TECs, the government changed the structure of training institutions. After TECs were introduced, they became the major body for the administration and delivery of training.[145] The idea of "local partnerships" was proposed to "bring decision-making together" with the establishment of "a network of 82 TECs covering England and Wales".[146] The government intended to remind employers that the 'ownership' of the training and enterprise system belonged to them.[147] With increased employers' participation, training provision could meet employers' needs and therefore, the skills and enterprise of the workforce could be improved.[148] By establishing TECs, the government's intention was to make the private sector aware of its responsibility in developing a skilled workforce and to involve employers in creating and funding a system for training.

At the beginning of the 1990s, there was a new law whose aim was an essential change in the funding system of further and higher education. The Further and Higher Education Act of 1992, this section indicates, was also an implementation strategy to involve employers.[149]

Education and Training for the 21st Century, a two-volume White Paper in 1991, led to the 1992 Act in which the Further Education Funding Council and the Higher Education Funding Council were founded. The aim of the new Councils was to undertake a fair, effective and efficient funding procedure. As a non-departmental public body, the Councils worked within the policy framework set by the Secretary of State for Education. The change to the funding mechanism was one of the most dramatic shifts in terms of practices based on neo-liberalism. The Conservative government made it clear that they were putting the ideology into practice, and thus minimising their involvement. 'Rolling back the state' was going to happen.

The Conservative governments between the end of the 1980s and 1995 produced many policy documents on education and training reform. These publications addressed the responsibilities of employers and individuals. Despite the absence of the term, 'lifelong learning', neo-liberal principles were put forward. After 1984 when an influential research report, *Competence and Competition: Training and Education in the Federal Republic of Germany, the United States and Japan*[150] highlighting the weakness of the UK was issued, government publications on education, training and employment were numerous. In the following year, the Department of Education and Science published *Education and Training for Young People*,[151] which presented the perspective that young people should be provided with a good foundation' of education and training to become 'a lifelong learner' in a later life. Such a system would foster highly skilled workforces. In 1988, the Department of Employment published *Employment for the 1990s,*[152] in which the prioritised agendas for training for both young people and adults were set out. As argued earlier, the impetus for lifelong learning policy was the notion of continuous skilling established by the end of the 1980s. Reflecting this notion, the policy documents created around that time and onwards addressed education and training for both young people and adults.

As indicated above, the Department of Education and Science's two-volume White Paper, *Education and Training for the 21st Century*[153] issued in 1991 proposed a drastic reform for post-compulsory education and training. The emphasis on the role of TECs and the introduction of the Further Education Funding Council signalled that marketisation and privatisation were taking shape. More documents followed with more emphasis on skills and qualifications. In fact, the emphasis became more and more strong in the 1990s. It was stressed that with skills and qualifications, individuals could control their working

lives and shape their careers and that individual commitment in obtaining skills and qualifications was required. Emphasising international perspectives, these documents urged employers and individuals to be more 'serious' about the labour force in the UK.

The Department of Employment published, in 1992, *People, Jobs and Opportunity*,[154] which stressed that skills and qualifications could determine success or failure. This also emphasised the responsibilities of individuals in shaping working lives. The government's role was to support people's obtaining the skills and qualifications that they needed and wanted.[155] In 1994, 1995 and 1996, there was a series of three White Papers on competitiveness co-created by the Department for Education and the Department of Employment. The message was clear:

> To compete internationally the UK needs a highly motivated and well qualified workforce. We need young people who are well prepared for work, employers who see the importance of developing the skills of their employees, and people in the labour force who take their development seriously.[156]

The National Advisory Council for Education and Training Targets (NACETT) was established in one of the three White Papers on competitiveness "to improve the UK's international competitiveness by raising standards and attainment levels in education and training to world class levels" through employers' investment and opportunities for individuals.[157] In 1995, the NACETT introduced Lifetime Targets, referring to the qualification level of the whole workforce and the Investors in People scheme which was to evaluate employers' commitment to training.[158]

A consultation document *Lifetime Learning* issued in 1995 was in a sense a summarised version of the previous publications. In this document, there was an explicit use of the term 'lifetime learning' as a synonym for continuous skilling after compulsory education. Although there was no sustained definition of 'lifetime learning', the interpretation of the

term was grounded in the field of education. These official documents are the projection of the development of lifelong learning policy. At the same time, they justified a need for a lifelong learning policy.

'Shared responsibilities' was a central strategy in neo-liberal politics. Lifelong learning in the form of neo-liberal policy emphasised the involvement of the private sector. The publication of policy documents, the establishment of TECs and the enactment of Further and Higher Education Act were a means to consolidate the strategy of 'rolling back the state' for continous skilling – lifelong learning.

5. Summary

This chapter on England has thus begun to answer the two research questions:

When and how were major lifelong learning policies formulated in England?

What was the strategy for the implementation of those policies?

The formulation of the first major lifelong learning policy in England was a response to some clear pressures. Firstly, lifelong learning was adopted to remediate domestic economic difficulty. When the economy stagnated through high unemployment, the unemployed population was targeted for training to bring them back into the labour market. This strategy largely derives from the historical perception that education and training determine economic performance and competitiveness. The prolonged recession in the 1980s led to the recognition of a need for a long-term training mechanism which could cure 'the British Disease'. This was when the notion of 'learning throughout life' – continuous skilling – emerged. Lifelong learning policy was a remediation policy for this problem.

Secondly, the strong political leadership based on neo-liberal ideology which

emphasised the market and individualism was a significant contributor to the formulation of lifelong learning policy. Due to tight national finances, 'the Welfare State' was in difficulties, and a transition in the role of the state was required. But this transition was partly created by a strong and determined leader, Margaret Thatcher as the Prime Minister. A corporatist quango, the MSC which formulated and implemented vocational training policy also played a role in developing the notion of continuous skilling. The need for continuous skills upgrading led to policy debate on lifelong learning which was closely linked with neo-liberal politics. Lifelong learning was well suited to the principles of neo-liberalism, i.e. the emphasis on employers' involvement and individual autonomy.

In this context, in 1995, the government issued *Lifetime Learning*, which officially used the term for the first time, aiming to persuade citizens of the need for lifelong learning as a public policy. It has therefore been suggested that the year 1995 saw the formulation of a major lifelong learning policy in England, although policy debate on lifelong learning had already began in the late 1980s. The government's argument was that England's economic recession stemmed from her weakness in terms of skills shortage, and that to foster a high-skilled workforce, the post-compulsory sector should be reformed. Increasingly, the term 'lifelong learning' was used.

The neo-liberal approach to lifelong learning included a strategy for policy implementation. The government was eager to involve employers. The government, with policy documents on education, training and employment reform, tried to convince the public of the need for employers' commitment in skills development. Other actions for persuasion included the establishment of TECs to involve employers in skilling projects, and legalising the new funding mechanism for further and higher education.

This study next analyses the case of Japan. The interpretation of lifelong learning was different in Japan, but the processes by which it developed as a policy shared some similarities with the English case.

ENDNOTES

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[1] Ann Hodgson, the interview of 8 July, 2002; Philip Edmeades, the interview of 9 July, 2002; Philippa Langton, the interview of 10 July, 2002; Tim Down, the interview of 11 July, 2002; Bob Fryer, the interview of 18 July, 2002; Tom Schuller, the interview of 21 August, 2002.
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[3] Andy Green, *Education and State Formation: The Rise of Education Systems in England, France and the USA* (London: Macmillan, 1990), p.244; Thomas Kelly, *History of Adult Education in Great Britain* (Liverpool: Liverpool University Press, 1970), pp.112-115.
[4] Thomas Kelly, *op.cit.*, pp.115-118; pp.120-124.
[5] *Op.cit.*, p.121.
[6] *Op.cit.*, pp.120-122.
[7] *Op.cit.*, pp.122-125.
[8] *Op.cit.*, p.138.
[9] *Ibid*.
[10] *Op.cit.*, pp.138-140.
[11] *Op.cit.*, pp.181-182.
[12] *Op.cit.*, p.186.
[13] D. H. S. Cranage (1920) in Kelly, *op.cit.*, p.189.
[14] A. E. Dobbs (1919) in Kelly, *op.cit*.
[15] Thomas Kelly, *op.cit.*, p.195.
[16] *Op.cit.*, p.197.
[17] *Op.cit.*, pp.207-208.
[18] Brian Simon, *op.cit.*, p.16.
[19] Thomas Kelly, *op.cit.*, pp.219-224.
[20] *Op.cit.*, p.237.
[21] *Op.cit.*, p.246.
[22] *Op.cit.*, p.250.
[23] *Op.cit.*, pp.267-268; pp.285-286.
[24] *Op.cit.*, p.333.
[25] Ann Hodgson, 'An International and Historical Context for Recent Policy Approaches to Lifelong Learning in the UK' in ed. Hodgson, *Policies, Politics and the Future of Lifelong Learning* (London: Kogan Page, 2000), pp.6-7.
[26] Advisory Council for Adult and Continuing Education, *Present Imperfect: A Discussion Paper on the Current Trends in Adult Education and the Issues to be Met in the Next Few Years* (Leicester: Advisory Council for Adult and Continuing Education, 1980), p.3.
[27] Fieldhouse (1996) quoted in Hodgson, *op.cit.*, p.8.
[28] Ann Hodgson, *op.cit.*
[29] Chris Humphries, the interview of 8 July, 2002; Lawrence Taylor, the interview of 10 July, 2002.
[30] Patrick Ainley and Mark Corney, *Training For the Future: The Rise and Fall of the Manpower Services Commission* (London: Cassell, 1990), pp.5-6.
[31] National Economic Development Council and Manpower Services Commission, *Competence and Competition: Training and Education in the Federal Republic of Germany, the United States and Japan* (London: National Economic Development Office, 1984), p.iii.
[32] *Op.cit.*, p.1.
[33] *Op.cit.*, p.iv.
[34] *Op.cit.*, pp.5-6.
[35] *Op.cit.*, p.6.
[36] *Op.cit.*, p.7.
[37] *Op.cit.*, pp.7-8.
[38] Department for Education and Science, *Education and Training for Young People* (London:

HMSO, 1985), p.1.
[39] *Op.cit.*, p.5.
[40] *Ibid.*
[41] *Op.cit.*, p.6.
[42] QCA, *The Story of National Vocational Qualifications* [http://www.qca.org.uk/nq/framework/story_nvqs.asp] (2001), page unknown.
[43] Chris Humphries, *op.cit.*; Lawrence Taylor, *op.cit.*
[44] Chris Humphries, *op.cit.*
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CHAPTER FOUR REMEDIATION AND FORMULATION: JAPAN

1. Introduction

As early as in the 1970s in Japan – shortly after UNESCO's advocacy – the term 'lifelong education' had been used in the field of education. Afterwards, there were a few occasions when 'lifelong education' was stressed in official documents, but concrete policy-making did not start until the mid 1980s.

This chapter, like the English chapter, has two research questions:

When and how were major lifelong learning policies formulated in Japan?

What was the strategy for the implementation of those policies?

This chapter suggests that in Japan, major lifelong learning policy was formulated during the period of the operation of *Rinkyoushin* [*Rinji Kyouiku Shingikai: Ad Hoc* Council of Education], i.e. between 1984 and 1987, to remediate a long-lasting problem of the country, '*gakureki shakai* [a credential society]'.

The process of the formulation was, as this chapter goes on to suggest, brought about by a strong political leader of the country who linked 'lifelong learning' to his political ideology.

It is also suggested that, as an implementation strategy, the government concentrated on the building of an infrastructure for a lifelong learning system.

This chapter is structured as follows: the next section examines how *gakureki shakai* was related to the idea of lifelong learning. The third section examines the formulation of lifelong learning policy. The fourth section analyses the strategy for policy

implementation. The fifth section is the summary.

The Japanese analysis starts with the beginning of lifelong learning policy as a remediation policy.

2. Remediation Policy

When *Rinkyoushin* was initiated in the mid 1980s, both the government and the public were very much aware that society was *gakureki shakai*. The objective of *Rinkyoushin* was to come up with education reform policies which could ease the excessive emphasis on academic qualifications. Hence, from the beginning, *Rinkyoushin*'s job was to search for a remediation of this classic problem.

Thus, lifelong learning policy was developed as a remediation policy for a particular problem, *gakureki shakai*. How that occurred will now be analysed.

In 1971, it was on two occasions that 'lifelong education' was first referred to in an official document: in the Reports of the Central Council for Education[a] and the Social Education Council.[b1] The need for the reexamination of the role of social education from the viewpoint of 'lifelong education' and the integration of family education, school education and social education under 'lifelong education' was proclaimed. During the 1970s and the 1980s, "examination hell", "an increase in incidents of maladjustment to school" and "institutional and operational rigidity and uniformity" in the education system were

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[a] The Report was entitled: *About the Basic Policy for Total School System Expansion and Maintenance in the Future*.
[b] The Report was entitled: *The Way Social Education Should Deal With Rapid Social Structure Changes*.

identified as problems.[2] Delinquency and dropouts[a] were seen as a result of a strict and rigid system, which concentrated too much on, as Horio puts it, "competition and the heartless sorting".[3]

Additionally, a new concern was developing: "remarkable social changes toward an internationalised and information oriented society", to which the school system was required to respond.[4] Nevertheless, no particular development was offered in 'lifelong education' policy. In 1981, the Central Council for Education published the Report, *On Lifelong Education* [*Shougai Kyouiku ni Tsuite*], which considered various educational functions in society from the viewpoint of promoting 'lifelong education'.[5] It was argued that 'lifelong education' should be fundamental throughout the whole education system so that the people can learn throughout their lives, choosing suitable learning contents, timing and environment.[6] The need for some adjustment in the rigidity of the education system was acknowledged, and the possibilities for 'lifelong education' were identified. However, again, there were no in-depth discussions of 'lifelong education' in terms of policy.

There was a major development in 1984 when *Rinkyoushin* was established to introduce educational reform, "which would be defined as the third comprehensive educational reform in Japan since the countrys [*sic*] modernization in the Meiji era".[7] As a response to the accumulating criticism of *gakureki shakai*, the government needed to find something new and flexible. It was in this Council that 'lifelong education' was renamed as 'lifelong learning'[8] and it was here that the concept was first discussed in policy terms[9] as the

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[a] Dropouts are termed *'ochikobore'* that refers to students who fall behind in their attempts to keep up with the fast pace of examination preparation.

antithesis of *'gakureki shakai'*. The earlier days of *Rinkyoushin* focused on the discussion of "liberalisation of education [*kyouiku jiyuuka*]". *Rinkyoushin*'s agendas to pursue 'liberalisation of education' had seven main priorities:

1. to consider changing the 6-3-3 school education system;
2. to revise the upper secondary school entrance examination system and discontinue reliance on test results as the main yardstick of students' academic success;
3. to revise the university entrance examination system;
4. to promote extracurricular activities, such as community service activities;
5. to reinforce moral education;
6. to encourage a more cosmopolitan outlook;
7. to improve the quality of teaching staff by revising training and hiring programmes.[10]

Rinkyoushin argued that 'liberalisation of education' was necessary since school-related problems had derived from the rigid school system which had neglected the diverse educational needs of the people.[11] The system needed to be restructured into a flexible and multi-track system which would revitalise "educational functions" and enhance "trust towards the education system".[12]

Rinkyoushin also argued that to realise the 'liberalisation of education', bureaucratic central control had to be reduced through decentralisation of education administration and the privatisation of education industries.[13] The emphasis became "individuality [*kosei*]", "self responsibility [*jiko sekinin*]" and "independent and autonomous spirit [*jishu, jiritsu no seishin*]".[14] The intention was to respond to the diversified values of the public and to their awareness of rights to educational choices. Based on these aims, therefore, a renaming from 'lifelong education' – which implied "teacher directed" education – to 'lifelong learning' – which implies "student controlled" learning – was needed.[15] The fundamentals of *Rinkyoushin* were the emphasis on individual autonomy and choice, the involvement of the private sector, and the reduction of state intervention.

According to Ichikawa, however, *Rinkyoushin* struggled to handle the concept of 'liberalisation of education'. Its interpretation shifted from the original "free choice of public compulsory school" to "valuing individuality [*kosei shugi*]" as a result of difficulties associated with actualising free choice; but ambiguity remained, so "the principle of emphasising individuality [*kosei juushi no gensoku*]" was adopted. Ichikawa goes on to argue that what *Rinkyoushin* had aimed at in the seven priorities was in this way narrowed, due to the difficulty of pursuing the original concept of 'liberalisation of education'. In the end, "a shift to a lifelong learning system" was substituted. In other words, 'a shift to a lifelong learning system' was a synonym for 'liberalisation of education'.[16]

The backbone of the current lifelong learning policy as an alternative to society with an excessive emphasis on academic degrees was formed at *Rinkyoushin*.[17] The alternative to the "overstructuration" was "a lifelong learning system".[18] Against the formal schooling system, which was "closed", rigid and therefore, difficult to change,[19] 'a lifelong learning system' that respects individual differences and preferences and produces adaptable and flexible human resources was attractive and persuasive. Lifelong learning policy was, therefore, aimed at changing the nature of Japanese society, i.e. 'a shift from *gakureki shakai* to a lifelong learning society'.

Before *Rinkyoushin*, several policy documents had tried to establish the principles of lifelong learning, setting a direction towards a lifelong learning society. Yamamoto *et al*, for example, indicate that since the 1960s, Japanese education reform policy had been based on "the principles of lifelong education".[20] However, it was not until *Rinkyoushin* that lifelong learning became a remediation reform 'policy' with the aim of rearranging *gakureki shakai*. *Rinkyoushin* founded the basis of the current ongoing education reform

and the development of lifelong learning. As opposed to a credential 'society', a shift towards a lifelong learning 'society' became central to social reform.

The above illustration partly answers the first research question of this chapter – *when were major lifelong learning policies formulated in Japan?* It was in the years between 1984 and 1987 at *Rinkyoushin*.

The rest of this section concentrates on discussing the other part of the question – *how were major lifelong learning policies formulated in Japan?*

Although the term *'gakureki shakai'* came to be used in the 1960s, the problem had developed over a long period of time. The development of *gakureki shakai* in Japanese society should be traced further as that is relevant to how lifelong learning policy was formulated.

'Gakureki shakai' is translated and defined in different ways. The most used translations are: "a credential society",[21] "a diploma-oriented society",[22] "an academic career society"[23] and "an academic pedigree society".[24] In terms of definitions, Koike and Watanabe define *'gakureki shakai'* as "a society which treats brand-name schools favourably without questioning the real abilities [of their students and graduates]".[25] Asou's definition is similar: "a society where individuals' social status is largely determined by credentials".[26] However, as Iwata argues, these definitions do not include the effect of formal schooling; it is the emphasis on formal schooling which brought excessive competition to entrance examinations which resulted in creating a credential

society.[27] As Fuwa puts it, Japan is "a highly school-centred society".[a28] In this sense, although *'gakureki'* literally means "records of education", what the term actually refers to is "*gakkoureki* [records of schooling]",[29] particularly the university from which a person graduated. This study accepts this view.

The next question is about the relationship between *gakureki shakai* and "*gakureki shugi* [credentialism]", which is a phenomenon in developed countries – not unique to Japan – brought about by industrial modernisation and the diffusion of education.[30] The generic pattern in the development of credentialism is: first, in a rapidly modernising society, human resource development is required, and that results in the expansion of formal schooling. Industry requires a means to evaluate new knowledge and skills for recruiting and allocating employees. Therefore, formal education produces certificates of achievements which serve as rationalised criteria. Once formal schooling is diffused, the number of those who stay in the system longer increases, and a need to differentiate the length and achievement of individuals' education emerges; credentials become the seemingly fair way of differentiation. Individuals also become credential-oriented; i.e. credentialism enhances the motivation for achievement and upward mobility, which contributes to the advancement of modern industrialisation . And, then, what Iwata calls "the paradox of credentialism"[31] occurs: the competition in entrance examinations intensifies, and the actual function of credentials – a nominally fair way of differentiation – decreases.[32]

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[a] Fuwa presents some figures which show that Japanese society values school credentials: out of the whole population of high school graduates, 76.1 percent go to higher education institutions, which include universities, colleges and general and higher vocational schools. The ratio of those who go to university or college – 47.3 percent – is one of the highest in the world (p.131).

The interpretation of the Japanese pattern of credentialism varies. Koike and Watanabe argue that university degrees – *gakureki* – are not necessarily a prerequisite for promotion since competition in Japanese companies is strong.[33] One implication of this interpretation is that Japanese credentialism follows the generic pattern described above. Achievements in the workplace determine promotion and salary; that is, merit is the criterion of promotion. What is unique to the Japanese version of credentialism is that credentials *only* refer to university degrees; *gakureki* [credentials] are the determinants of life, as Ogata argues.[34] Iwata's interpretation is similar, further indicating that the Japanese seniority wage system in combination with lifetime employment is the Japanese way of meritocracy[a] in which wage disparities occur according to the evaluation of achievement based on age,[35] not merits. Koike and Watanabe move to the conclusion that Japanese society as *gakureki shakai* is "another self-tormenting idea"; they even call it "prejudice".[36] However, this extreme interpretation appears to be inappropriate since credentialism does exist in Japan. As Fuwa puts it: "Japanese society has traditionally regarded school educational career as the most important standard of social estimation of people throughout their life span".[37] Also, as Iwata stresses, university degrees have been influential in, for example, promoting employees.[38]

According to Amano, the genesis of credentialism in Japan dates back to the beginning of the Meiji period when the era of examinations began.[39] At the start of the modernisation process, the employment system for government officials was premised on the systematised school system with the Imperial University at its summit, and its

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[a] Meritocracy, first fully explored in Young's *The Rise of the Meritocracy*, is about those who own merits and control the society based on the principle that social status and remuneration should be obtained by effort and merits, not by social class or birth (Fujita, 1997, p.174; pp.178-180).

examination system played an important role in "social evaluation and selection based on performance and ability".[40] Japanese society experienced, borrowing Dore's term, "the late development effect".[a41] Functioning as "screening", credentials were the "passport" for "the admission to small circles of modernity".[42] Amano indicates that it was around 1920 when "full-scale institutionalisation of academic credentialism"[43] was established, although the terms, *'gakureki shakai'* or *'gakureki shugi'*, came into common use only in the 1960s.[44] "The decision by Japanese enterprises to stress the importance of an applicant's diploma when considering him for employment, however, played the most critical role in the institutionalisation of academic credentialism."[45]

Such a strong link between credentials and business was not seen in other developed countries. In Japan, due to the late start of modernisation, a university degree was regarded as "a job qualification" not only for government and professional jobs, but also for the business sector. It came to value individuals' educational backgrounds, and the institutions from which they graduated came to influence the selection of employees and to determine starting salaries. As a consequence, people seeking a career in business compete to enter a high-ranking school, and the competition for a better career increases as the society becomes more industrialised.[46]

Also, industrial relations during the post-war period have contributed to the escalation of credentialism in Japan. According to Koike, labour unions in Japan take the form of "enterprise unions"[47] of which "a joint labor-management consultation system"[48] is a large component. Skill formation which tightly links employers and employees is integral to

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[a] Dore's meaning of 'the late development effect' is that: "the later a country starts modernization, the more there is a tendency for qualificationism (or credentialism) to be more deeply entrenched and for higher diplomas to be more highly evaluated (Kurosaki, unpublished paper)."

"corporate success" in the "risk-sharing model"[49] of labour-management relations. Japanese companies avoid dismissing employees, but at the same time, invest in employees to increase productivity and to grow quickly; responding to employers' efforts, employees expand their skills and the knowledge required in the workplace. Consequently, employees tend to stay within a single company, acquiring enterprise-specific skills through experience and promotion.[50] Young people who prepared for their career in business came to favour entering large companies which have a well-prepared package of lifetime employment, a seniority wage system, and strong in-service training provision. A diploma of a well-known university is necessary to obtain this package, which guarantees "well-being for a long time".[51] The nature of industrial relations is central in reinforcing the competition of getting into a prestige university.

Egalitarianism which was the post-war principle in restructuring the school system has influenced Japanese credentialism as well. Fairness in the selection process – the graduation certificate of one stage becomes qualification for the next stage – is socially emphasised. After the quantitative expansion of primary and secondary education had been achieved, more of the population came to progress to higher education, and by the 1960s, the Japanese people were keen on obtaining access to higher academic qualifications.[52] At the same time, during the 1950s and 1960s when the economy was experiencing high growth, children's academic abilities particularly for passing examinations were valued.[53] Japan's *gakureki shugi* – "academic pedigreeism" in Horio's vocabulary – became well-known worldwide. The OECD, for example, criticised the Japanese examination-centred education system as an extreme form of meritocracy.[54]

However Horio argues that the fundamental problem of the system was neither 'academic pedigreeism' nor 'meritocracy'. The problem stemmed from the interpretation of the meaning of "an education according to ability" as declared in the Constitution and the Fundamental Law of Education.[55] Horio considers that the policy-makers' interpretation was *"academic pedigree = academic ability = ability"*:[56] "As this pedigree [credentials] becomes an index of ability, the ideology of pedigreeism [credentialism] becomes inevitably linked to the ideology of ability-first, and the examination competition becomes more and more overheated."[57] It has thus been argued that:

> the main cause of the disease devastating the schools of Japan today is the dominant influence exerted upon the practice and pursuit of education by the representations of ability formulated and sponsored by the government in cooperation with industry. . . . since the objectives of postwar reconstruction were realized in the mid-1960s, the importance of examination competition has become more pronounced, especially as part of the government-initiated policies designed to produce rapid economic growth. In this context the government-manufactured theories of ability must be understood as having played a major role in the ongoing reorganization of Japanese social and educational life.[58]

As Outa argues: "The school certificate is seen as one of the meritocratic symbols."[59] Indeed, university degrees were treated as a measurement of academic ability and therefore they were an important component of meritocracy. Credentialism permeated the education system and the social system, influencing people's perceptions and activities.[60] The egalitarian and meritocratic school system contributed to the escalation of credentialism. When everyone was in the race, competition became more severe.

Furthermore, in relation to egalitarianism and ability, the Japanese conception of "effort" has contributed to the escalation of credentialism: academic achievement depends on

'effort'.[61] Such a perception has been linked to upward social mobility:[a] the more you endeavour, the higher you move up through "the vertical ladders".[62] Parents' interest became making their children succeed in the entrance examinations of distinguished universities so that their future in 'the vertical ladders' could be guaranteed.[63] This resulted in competitive credentialism in a highly selective system.

Once credentialism was established as a social process, getting the actual credentials themselves became a formality rather than a substantial selection process.[64] Then, the inflation of credentials occurred,[65] which resulted, in Kaneko's vocabulary, in "*chou gakureki shakai* [an ultra credential society]", [66] or in Cummings' words, the "overstructuration" of society.[67] Japanese society was, borrowing Horio's words, in "moral bankruptcy".[68] The fame of the diploma of universities, not the content and quality of education and training, became a concern in society. Students continued to stay in the education system merely to gain further formal qualifications.[69] Upper secondary schools as well as universities were strictly ranked. The industry providing information on entrance examinations grew and the value of ranking schools increased. The emphasis on ranking led to a strengthening of the link between high-ranking university graduates and job opportunities in large firms.[70] Entering prestigious universities was valued, and as a consequence, the process became even more competitive, putting heavy pressure on children. The term "examination hell [*juken jigoku*]" was used to criticise the escalating competition.[71] The downside of credentialism, 'the examination hell', which produced many problematic children lacking common sense, customary manners and sensibilities, was criticised by both the government and the public.[72] The government came to

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[a] Takeuchi also suggests that there is a "fear of great failure (Kinmonth, 1981)" which enhanced Japanese society's upward mobility.

acknowledge a limitation in building a future with elites who are only good at examinations.

Thus, in Japan, policy debates on lifelong learning began addressing *gakureki shakai*, and, with *Rinkyoushin*, lifelong learning policy became a remediation for the problem of Japan, *gakureki shakai*. Hence, it was the years between 1984 and 1987, when *Rinkyoushin* operated, that a substantial lifelong learning policy was formulated. The problem of credentialism was, as this section has illustrated, developed during the country's modernisation and intensified through the economic growth during the post-war period. The peculiarity about the Japanese version of credentialism was an extreme emphasis on university degrees, which became 'a meritocratic symbol'. The struggle against this long-standing perception was reflected in the interpretation of the idea of lifelong learning.

However, this linkage between the rigid societal problem and the idea of lifelong learning does not fully explain the formulation of lifelong learning policy in Japan. As happened in England, strong political leadership was also an important component of the formulation process.

3. Policy Formulation

As mentioned earlier, the 1980s was a period when neo-liberalism expanded in many developed countries, and Japan was no exception. It is suggested in this section that *Rinkyoushin*'s political ideology was neo-liberalism, promoting privatisation, deregulation and decentralisation. The ideology was supported and developed by a political leader, the Prime Minister, Yasuhiro Nakasone. The triad of neo-liberalism, Nakasone and *Rinkyoushin* framed a clear political message.

The development of a neo-liberal approach in Japan largely stemmed from economic needs. Post-war Japan had experienced dramatic socio-economic change and a rise in the standard of living. For example, the population in 1950 was only 83 million but grew to 100 million by the end of the 1960s and 120 million in the middle of the 1980s.[73] By the end of the 1960s, company employees were enjoying secure lifetime employment with stable good pay and training provided, although they were not necessarily well educated. By the 1980s, in Beasley's words: "Japanese standards of living were undoubtedly impressive . . . high real wages, low unemployment rates, excellent health care, above average consumption of goods and services"[74] were obvious although there was a poorer quality of life in such areas as long working hours and small amounts of residential space, compared with European standards.[75]

However, the national economy had suffered reverses. After the Oil Shock of 1973,[a] the high growth of the Japanese economy eased, and revitalisation of the economy was positioned as important in the national agenda.[76] Welfare policies, having had the effect of raising people's standard of living during the post-war period, were straining public finance. It was from industry and business, which had survived the recession through the strenuous efforts at industrial rationalisation and which had secured relatively full employment, that the need for administrative and financial reform was proclaimed as an alternative to tax increases. In 1981, a cutback in public spending was announced by the

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[a] The Oil Shock brought "Japan's phase of exceptionally rapid growth to an end. As a country which depended on oil for two-thirds of its energy supplies and on imports for almost the whole of its oil, Japan inevitably suffered a huge increase in its import bill and a general price rise. The wholesale price index went up by 31 per cent in 1974. Cuts in the use of oil, imposed by the government in order to restrain imports of it, pushed the economy towards recession, with the result that gross national product showed a decline in that year for the first time since the occupation (Beasley, 1995, p.249)."

Ad Hoc Administration Investigative Committee [*Rinji Gyousei Chousakai*]. The committee's strategy was to increase the use of the private sector funds and, therefore, to reduce the proportion of the national budget spent on the public sector for the revitalisation of the Japanese economic system.[77]

As a major component of public policy, the field of education was a key area. Since the Central Council for Education Report of 1971, education policy had been centred upon the quantitative and qualitative expansion of the education system, but due to the cutback of the educational budget during the prolonged recession, a shift to "the benefit principle" was announced. When Nakasone's Cabinet was formed in 1982, reform was started, based on the principles of "cutting down on public spending" and "diversifying the school system".[78] That was the grounds for *Rinkyoushin*'s 'liberalisation of education [*kyouiku jiyuuka*]',[79] the building of a more flexible social system compared with that which had developed during the period of high economic growth.[80]

Individuals were required to change, as were industries. When the Japanese economy was set against Western economies, Japanese industries came to appreciate that borrowing and copying technologies of the developed countries was not enough and that original technological development was also needed.[81] Also, the fundamentals of Japanese management such as the seniority wage system and lifetime employment were questioned. These had worked well during a period of high growth; the vertical decision-making and the top-down command system were well understood, and the basic ethos was to obey instructions 'from the top' and to work hard without complaining, which enabled high performance particularly in the secondary industries. However, after the Oil Shock and lower growth in the economy, such a style of management was reconsidered and the need for more diverse human resources was acknowledged. Also,

the expansion of the tertiary industries indicated the need for new skills and knowledge amongst workers. For these reasons, lifelong learning was also welcomed by corporate society.[82]

As a background to *Rinkyoushin*, therefore, there were economic factors affecting the availability of public finance. The government had to reduce public spending, and as a consequence, the notions of privatisation and marketisation as well as individualism were emphasised. In education and learning, in Makino's words, "the industrialization of education"[83] began. Free choice and individual responsibility, termed 'liberalisation of education', became pivotal as a response to economic factors. This was where lifelong learning came in. "An open image" of lifelong learning, as Akao argues, was adopted to advocate the transition from "education controlled by the state" to "learning subjectively chosen by individuals". "Self learning", i.e. lifelong learning, was, in fact, a policy to cut public spending.[84] Individuals were expected to choose by themselves what to learn, and when and where to learn, and to pay as the "beneficiaries"[85] of the learning activities.

Another important contributory factor which contributed to the development of neo-liberalism was the expansion of consumer culture in the 1980s. Learning was treated as "consumption" rather than "investment".[86] This meant the emphasis on learning processes rather than on learning results, and the expansion of the notion of "learning for leisure" or what Miyasaka calls, learning as "an entertainment".[87] Such treatment of learning was possible as the popularisation of education with the diffusion of secondary education and the expansion of higher education had already been achieved. Hence, the government could promote a learning system based on deregulation and privatisation, increasing learning options through private enterprises, so that "consumers" could choose their preferences.[88] For this reason, as pointed out earlier, the renaming of

'lifelong education' as 'lifelong learning' was important. This change involved a treatment of learning as consumption, which emphasised individual choice and individual learning process.

An emphasis on individualism has the danger of inviting explicit stratification. Satou indicates the link between the emphasis on individuality and the implication of elitism, and claims that the fundamental aim of *Rinkyoushin* was to stratify the education system for elite and ordinary people, with lifelong learning used as an ideology to rationalise the abolition of conventional school education.[89] School education had been wasteful since not everybody could progress to higher education; therefore, to pursue efficiency, schooling needed to classify or differentiate elites and others.[90] To what extent *Rinkyoushin* actually aimed at stratification for efficiency is difficult to identify, but Satou's point leads to the suggestion that *Rinkyoushin*'s neo-liberal approach was rigorous and radical.

Thus, lifelong learning was suited to neo-liberalism. For the purpose of effective and efficient use of public resources, the emphasis on privatisation, marketisation and individualism was chosen, and one way to pursue this was through the promotion of lifelong learning. The Prime Minister Nakasone, and his operational body, *Rinkyoushin*, contributed to consolidating neo-liberal ideology, and consequently, to the formulation of lifelong learning policy.

Nakasone had already begun working on reforming the administrative structure before he became Prime Minister. The process was later termed "Nakasone's administration reform".[91] To the slogan "the total clearance of the post-war political accounts [*sengo seiji no soukessan*]", Nakasone was determined to change the ideologies of Japan,[92] within a

firm picture of the reform that Japan needed: "We should implement various reforms that will further promote liberalisation, openness, and participation. This applies equally to economic affairs, education, and international relations."[93] Nakasone was often described as "the neo-liberal trend of the LDP", "a member of the new right", "both a conservative and a liberalisation person" or "a neo-conservative",[94] and he himself defined his idea of "conserving" as:

> First, to conserve Japan's beautiful nature and country. Second, to conserve Japanese people's way of life and desire for that way of life. Third, to keep the liberal and market economy. Then fourth, it is to conserve the positive national vitality and progress which the Japanese people showed in the major reformations and the Meiji restoration.[95]

Nakasone's understanding of the role of the state was clear: "Not everything has to be done by the government. Things which can be handed over to the private sector should be handed over."[96] In education, therefore, Nakasone was in favour of increasing freedom of choice, deregulation, flexibility and competition between institutions, particularly if it reduced government costs.[97]

Hood indicates Nakasone's five key educational principles which mostly seen in neo-liberal principles: "individualism [*jinkaku shugi*]", "nationalism [*kokumin shugi*]", "internationalism [*kokusai shugi*]", "meritocracy [*jitsuryoku shugi*]" and "regionalism [*chihou shugi*]".[98] Nakasone believed in individualism and a meritocracy but was simultaneously aware of the danger that this ideology could accelerate social fragmentation and "me-ism [extreme selfishness]".[99] Hence, Nakasone emphasised the importance of morality and the role of family and communities to foster morality in children:

> I cannot believe that the problems of drugs, crime, violence, and other phenomena that corrode our youth are unrelated to the decline of the home as the basic unit of society and the lack of education for our young people in such basic and essential social patterns as courtesy, responsibility, honesty,

brotherly love, neighbourly kindness, and the spirit of service.[100]

For Nakasone, the balance between individualism and a meritocracy, and morality was important.

In terms of nationalism and internationalism, one criticism has been that Nakasone was too nationalistic. But as Ichikawa argues, drawing on Ougoku, Nakasone's nationalism differed from traditional nationalism: to be exclusive, but to establish the nation's identity in the international world. The intention was to promote an international contribution, hence the principles fit with internationalisation.[101] Nakasone was aware of the importance of both collaborating with strong nations and gaining a firm international position for Japan. Therefore, he worked hard to develop a good relationship with the then United States President Reagan and then British Prime Minister Thatcher. Sawano points out that all the *Rinkyoushin*'s reports were translated into English, which had never happened before, serving as evidence of Nakasone's eagerness for internationalisation.[102]

Similarly, Hood defends Nakasone's "healthy nationalism" and "healthy internationalism".[103] 'Healthy nationalism' is to value traditional culture and to enhance the cohesion of Japanese society. 'Healthy nationalism' is, according to Hood, close to patriotism: love towards the long history, the traditions and culture of Japan.[104] 'Healthy internationalism' addresses Japanese identity as well as tolerance for others and mutual understanding with deep knowledge of other traditions and cultures. In other words, 'healthy internationalism' can only be achieved together with 'healthy nationalism'.[105] For Nakasone, both were equally valuable in building "the Japanese identity" in moving from, in Goodman's words, "the Japanese system of what he perceived as its American occupation influence" to "another step towards Japan's emergence as an independent

country on the world stage".[106] As Nakasone put it:

> The Japanese education system had failed in this area of teaching the people to understand and respect their own culture and traditions . . . it was necessary for children to be taught the basic rules, obligations and responsibilities that go with peace, democracy, human rights and freedom.[107]

These themes – culture, rules and peace – could also be integrated into the idea of lifelong learning. Its flexibility enabled various aspects of neo-liberalism to be encompassed.

Nakasone's reforms were large-scale, and education reform played an important role. As Hood puts it: Nakasone was seeking "a reform of the sort of Japanese person 'produced' by the education system" and treating it as "a stepping stone to a reform of society as a whole".[108] Nakasone, who was often said to be "un-Japanese" or "unconventional",[109] was determined to reform the country. Having been active in educational agendas before he became Prime Minister, e.g. the textbook issue of the 1950s, Nakasone was aware of the necessity to change the education system to change *gakureki shakai*. The idea of 'lifelong learning' was able to absorb neo-liberal principles. And the place to realise his beliefs and visions was *Rinkyoushin*.

Rinkyoushin was an advisory committee to the Prime Minister which was directly controlled by then Prime Minister Nakasone. As Taguchi indicates, before *Rinkyoushin* actually started, Nakasone had already had the outline of his education reform.[110] Based on his outline, *Rinkyoushin* elaborated its content and developed it into policies. The political form of *Rinkyoushin* made that process possible. *Rinkyoushin* had authority across ministries and agencies, and its policy-making was larger in scale and quicker in process than the usual 'council' formed within a Ministry. Nakasone appointed "pro-liberalisation" members to *Rinkyoushin*, aiming to formulate education reform policy

which would liberalise and deregulate the rigid education system which was "characterized by standardization, centralization, and insulation from international influences". The council was commonly referred to as "Nakasone's *Rinkyoushin*".[111]

The political method of *Rinkyoushin* was called "the brains politics"[112] or "brain-trust politics",[a113] which was familiar neither to politicians and civil servants, nor to the public at that time. This method enabled easier public support and minimised the risk of opposition from both within the party and from other parties.[114] According to Beasley: "By making more use of the specialized sections of the Prime Minister's secretariat, plus advisory groups recruited in part from non-government service, he was able at times to bypass the Diet and the regular bureaucratic machinery, and to appeal directly to the public."[115] Nakasone was aware of the importance of reducing bureaucracy, involving sectors outside the government and winning the public over to his side.

The *Rinkyoushin*'s outcomes were challenging: first, the integration of school education, social education and family education because they are so clearly divided that their complimentary role of human development was neglected; second, a shift from society where examination competition is severe and academic qualifications are heavily valued to a lifelong learning society where self-development throughout life is encouraged and learning outcomes are fairly evaluated; and third, the creation of a system which enables acquisition of new skills and knowledge required in response to economic development,

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[a] 'The brains politics' or 'brain-trust politics' had been used by previous Prime Ministers. Its process is as follows: First, the Prime Minister has unofficial discussions with his Ministers and staff on particular policy issues and asks them for further research. Before official deliberation, proposals for the direction of policies is sought from informal discussion groups formed in private bodies as well as in the administration. The Prime Minister then sets up a council electing experts from various fields to make recommendations. The outcome of the council goes to the press to open up public debate.

technological innovation, change in industrial structures and urbanisation.[116] All of these were condensed into 'a shift from *gakureki shakai* to a lifelong learning system' – from a society which valued academic diplomas to one which enabled a variety of learning opportunities, easier access to learning, and diverse evaluation systems. One of the proposals made to promote plurality in evaluations was a system for official vocational qualifications to enhance flexibility and mobility in people's learning and working environments.[117] The *Rinkyoushin*'s view was that the conventional nation-led human resource development which emphasised measurable knowledge was too limited for the new era.

There is an indication that outcome of *Rinkyoushin* was more shaped by the work of the "thinkers" around the Prime Minister rather than Nakasone himself; as some Japanese government officials were trying hard to study Thatcher's reform in the UK.[118] The ideas of freeing up school choice and founding new schools – 'liberalisation of education' – were advocated by the economists who were the members of *Rinkyoushin*.[119] It is indeed, as Hood points out, a difficult task to 'prove' that Nakasone was the most influential figure of *Rinkyoushin* and responsible for its outcome. "However, the events during this period do reveal that Nakasone had a sizeable influence, and the results of the education reform programme further demonstrate how important his role was."[120] A strong political figure was needed to turn the idea of lifelong learning into policies. Nakasone was, borrowing Hood's words, "one of the first Japanese leaders to act upon his beliefs".[121] Nakasone as a Prime Minister was therefore crucial in the formation of *Rinkyoushin* and to the evolution of lifelong learning policy.

The process of the formulation of lifelong learning policy involved the locating of the idea of lifelong learning as a remediation of *gakureki shakai*, a long-standing problem of

Japanese society. This was achieved by a strong political leadership based on neo-liberal principles promoted by Nakasone and his *Rinkyoushin*. 'A shift to a lifelong learning system' amounted to social reform based on decentralisation, privatisation and individualisation but sounded better. Lifelong learning was well adapted to neo-liberalism.

After *Rinkyoushin*, policy implementation as well as further policy-making continued. At the same time, the government had to convince citizens that the outcome of *Rinkyoushin*, 'a shift to a lifelong learning system' was reasonable. The Japanese government took up a particular strategy, which is the second research question to be discussed: *What was the strategy for the implementation of lifelong learning policies?*

4. Implementation Strategy

In the case of Japanese lifelong learning policy, as this section suggests, the major implementation strategy was the establishment of an infrastructure for a lifelong learning system grounded on neo-liberal principles. The national and prefectural Lifelong Learning Councils were established, the Law specifically on the administration of lifelong learning was enacted and comprehensive policy documents on lifelong learning were published after *Rinkyousin*'s closure. This section puts forward the view that, with these political actions, the government began pursuing a quick and effective means for the creation of a lifelong learning system.

Soon after the closure of *Rinkyoushin*, the building of an infrastructure to create a lifelong learning system started. In 1988, the Lifelong Learning Bureau was established within

the Ministry of Education, Science, Sports and Culture (MESSC)[a] as a leading Bureau.[122] But actual policy-making was left to the Lifelong Learning Council which was set up within the Lifelong Learning Bureau in 1990. The original twelve members of the Council were from the Ministries and Agencies outside the MESSC.[123] This movement was new – the policy-making of lifelong learning evolved outside the education administration. Moreover, the government encouraged all Ministries and Agencies, local administrative organisations and private bodies to be involved in promoting lifelong learning in the creation of a lifelong learning system.[124]

The purpose of the national Lifelong Learning Council was to build a system for the promotion of lifelong learning and the development of its policies, integrating school education, social education and cultural promotion. The Council, after investigating and deliberating agendas relating to lifelong learning and social education, presented proposals to Ministers. Also, prefectural governments were recommended to establish their Lifelong Learning Councils, through which forms of lifelong learning were to be promoted.[125]

Some parts of the outcomes of the *Rinkyoushin* were legalised in 1990 in 'the Law Concerning the Establishment of Implementation Systems and Other Measures for the Promotion of Lifelong Learning'.[b126] A cross-ministerial approach was taken in the drafting of the Lifelong Learning Promotion Act, involving sixteen Ministries and Agencies.[127]

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[a] In 2001, the MESSC became the Ministry of Education, Culture, Sports, Science and Technology (MEXT).
[b] Abbreviated as the Lifelong Learning Promotion Act.

The Act had three major aims. The first was the establishment of the Lifelong Learning Council. It was stipulated that the Council could function as an advisor to the Prime Minister if necessary, although the Council was in the Ministry.[128] This was unusual when compared with the conventional ministerial structure. Second, the Act aimed to promote the decentralisation of authority.[129] The central government aimed at the nation-wide autonomous development of lifelong learning at the prefectural level. Recommendations were the establishment of a department in charge of lifelong learning and a committee for promoting lifelong learning in each prefecture, and the setting up of Lifelong Learning (Promotion) Centres [*Shougai Gakushuu (Suishin) Sentaa*] at the prefectural and municipal levels, which were for developing programmes and running courses and activities. But at the same time, the central government tried to hold the consensus of policy formulation and implementation at the prefectural level, not at the municipal level. This was a lesson learnt from previous experience; the social education administration which was centred upon municipalities had allowed small-scale localisations, which resulted in fragmented practice of social education.[130] Third, the Act aimed at privatisation. To involve the private sector, each prefectural authority was encouraged to make 'a Localised Fundamental Plan for the Promotion of Lifelong Learning [*Chiiki Shougai Gakushuu Shinkou Kihon Kousou*]'[131] which was an overall plan for the integrated provision of learning activities incorporating the best use of regional private enterprises.[132] For private providers, "special districts with preferential taxation" were made available.[133]

In relation to the third aim, what was novel about the Act was the involvement of the Ministry of International Trade and Industry (MITI). The MITI, "the most powerful bureaucracy in Japan",[134] was keen on the development of "the lifelong learning

industry".[135] One analysis indicates that the MITI thought that "there was money to be made" out of lifelong learning and "encouraged" businesses to get involved, as the Ministry had always guided them.[136] The direct involvement of industry and the MITI in the policy-making and implementation of lifelong learning was an indication of economic ends in education and learning. The introduction of neo-liberal principles was achieved with a radical change to the decision-making in the field of education.

The Lifelong Learning Act presented a broad policy framework for the creation of a lifelong learning system. The aims of the Act were the projection of the neo-liberal solution offered by *Rinkyoushin*. The Act was an effective means of legitimating lifelong learning policy.

There was another political action which was to contribute to the building of an infrastructure. The issuing of publications was an important part of the implementation strategy. As the government thought that 'a shift from *gakureki shakai* to a lifelong learning system' was a large-scale project, the policy-making and implementation of lifelong learning policy should not be confined to the education administration. After *Rinkyoushin*, not only the Lifelong Learning Council's Reports, but also the White Paper on Education [*Waga Kuni no Kyouiku Shisaku*] and the Central Council for Education's Reports discussed lifelong learning.

A document which should first be mentioned is the White Paper on Education, which was published in 1989. The idea of publishing a White Paper on Education every year was an outcome of *Rinkyoushin*. Justification for the adoption of lifelong learning was given. The reasons that lifelong learning was necessary were: "undue societal attachment to academic career", i.e. *gakureki shakai*, "a maturing society's increased demands for

learning" and "provision of learning opportunities in response to societal and economic changes".[137] Since its first issue, the White Paper on Education has been annually published with an emphasis on this justification.

Prior to the first publication of the Lifelong Learning Council in 1990, the Central Council for Education issued a Report. *Regarding the Arrangement of the Infrastructure of Lifelong Learning* [*Shougai Gakushuu no Kiban Seibi ni Tsuite*] offered an overall approach to overcome the harmful effects of *gakureki shakai*. First, the understanding of lifelong learning was clarified: lifelong learning should be undertaken voluntarily; lifelong learning takes place throughout life with a method suitable for each individual; and lifelong learning includes leisure, sports and hobbies as well as intentional and organised learning activities.[138] Second, a proposal for the role of local education administration was offered: arranging a system for guidance and advice for learners; and running campaigns to motivate learners and potential learners as well as creating a system for evaluating learning results.

Third, the role of the private sector was discussed: private educational providers are expected to contribute in promoting lifelong learning, responding flexibly to diverse learning demands.[139] And fourth, the report repositioned school education in relation to lifelong learning: at school, the foundation of lifelong learning has to be fostered in a way that individuals have the will and attitude to learn spontaneously; and formal educational institutions should offer learning opportunities to the local population.[140] The Report aimed to clarify what lifelong learning is, discussing the administrative relationship between school education and lifelong learning and proposing practical possibilities to increase the flexibility and variation in the system of learning. Less state control, more autonomy for local governments, involvement of the private sectors, and emphasis on

voluntary learning – all these elements stemmed from the neo-liberal principles of *Rinkyoushin*.

On the basis of this White Paper on Education and the Central Council for Education's Report, lifelong learning policy was expanded and consolidated by the Lifelong Learning Council. Its first Report issued in 1992, *Measures to Promote Lifelong Learning in Response to Social Trends* [*Kongo no Shakai no Doukou ni Taioushita Shougai Gakushuu no Shinkou Housaku ni Tsuite*] reemphasised that a lifelong learning system had to replace the conventional education system of *gakureki shakai*. The measures to achieve that end were put forward: the establishment of a lifestyle of learning throughout one's life; the identification of people's latent learning needs and converting them into actual learning; the linking of schools and other educational institutions to expand the learning provision in specialised areas; and the actualisation of making the best use of learning outcomes in the workplace, community and society. To diversify learning opportunities to correspond to the needs of the society, four particular learning areas were prioritised: recurrent education, volunteer activities, outside-school activities and current agendas such as defining intellectual property or dealing with aging society.[141]

As Yamamoto *et al* indicate, these two Reports, which were developed from *Rinkyoushin*'s Reports, were to become the foundation of the later policy-making of lifelong learning.[142] The measures taken were to encourage everybody to take advantage of 'broader' learning which was not about technical knowledge for entering a good university or for getting a good job; but rather the expansion of 'choice' for learners. Efforts to change the rigid system of formal state schooling went hand in hand with the policy of reducing state intervention.

The Japanese government's strategy for the implementation of lifelong learning policy was the creation of the framework of a lifelong learning system. This first step towards the building of the system was carried out top-down by the central government.

5. Summary

This chapter on Japan can be summarised in terms of answering the two research questions:

When and how were major lifelong learning policies formulated in Japan?

What was the strategy for the implementation of those policies?

The formulation of the first substantial lifelong learning policy in Japan took place in the years between 1984 and 1987 during *Rinkyoushin*. The idea of lifelong learning was first connected to a historical problem of society which in Japan was *gakureki shakai*. Japanese credentialism can be characterised as the extreme valuing of university degrees. This characteristic had developed historically and has become deeply embedded in the behaviour of social actors: therefore, it is difficult to change. White Papers issued at the beginning of the 1970s already mentioned the need for the creation of a lifelong learning society. But it was not until the late 1980s during *Rinkyoushin* when the policy-making of lifelong learning began to be seen as a remediation for the inflexible education system. 'A shift to a lifelong learning system' became a policy slogan of *Rinkyoushin*, and the slogan marked the creation of a lifelong learning policy in Japan.

The other element of the policy formulation was a political factor. Strong political leadership enabled substantial policy-making. Difficult economic moments after the Oil Shock resulted in a need for change in the role of the state, which was a general phenomenon in many developed countries in the 1980s. Neo-liberalism was a solution, and Japan shared much of this perspective. A politician who keenly promoted a

neo-liberal ideology was Nakasone. In education, adopting neo-liberal principles, he aimed at large-scale reform, setting up a new style advisory committee, *Rinkyoushin*. 'Liberalisation of education' was discussed in the early years of *Rinkyoushin*, but gradually, 'lifelong learning' was adopted. This idea was attractive and was also able to encompass neo-liberal principles that stressed privatisation, marketisation and individualism.

The Japanese government's implementation strategy was a nation-wide infrastructure for a lifelong learning system. First, arrangements for the administration of lifelong learning were established: i.e. setting up the Lifelong Learning Bureau and the national and prefectural Lifelong Learning Councils. Second, the Lifelong Learning Promotion Act was enacted to regulate the lifelong learning administration. Third, policy documents (in which privatisation, marketisation and individualisation were addressed) were issued after *Rinkyoushin*. These three strategies constructed a general approach to the development of a lifelong learning society based on neo-liberal principles.

However, in neither country were these processes completed, nor were the trajectories going to remain stable. The next two chapters discuss policy changes after the initial years of lifelong learning policies in England and Japan. The processes of the change were complicated, which led to extreme divergence in the two countries after the initial phase of neo-liberal lifelong learning policies.

ENDNOTES

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[2] MOE, *Japanese Government Policies in Education, Science and Culture 1989: Elementary and Secondary Education in a Changing Society* [http://wwwwp.mext.go.jp/eky1989/] (1989), page unknown.

[3] Teruhisa Horio, edited and translated by Steven Platzer, *Educational Thought and Ideology in Modern Japan: State Authority and Intellectual Freedom* (Tokyo: University of Tokyo Press: 1988), p.321.

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[5] Haruo Satou, '*Gakkou to Chiiki de Tsukuru Manabi no Mirai* [The Future of Learning Which is Created by School and the Community]' in eds. Shiraishi and Satou, *Gakkou to Chiiki de Tsukuru Manabi no Mirai [The Future of Learning Which is Created by School and the Community]* (Tokyo: Gyousei, 2001), p.8.

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[7] MEXT, *Japanese Government Policies in Education, Culture, Sports, Science and Technology: Educational Reform for the 21st Century* [http://wwwwp.mext.go.jp/eky2001/index.html#toc1.9.1] (2001), page unknown.

[8] J. E. Thomas, Takamichi Uesugi and Shuichi Shimada, 'New Lifelong Learning Law in Japan: Promise or Threat?', *International Journal of Lifelong Education*, Vol.16, No.2, 1997: 132-140, p.135.

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[11] Shougo Ichikawa, *Rinkyoushin Igo no Kyouiku Seisaku [Education Policies After Rinkyoushin]* (Tokyo: Kyouiku Kaihatsu Kenkyuusho, 1995), p.12.

[12] Rinkyoushin, *Dai 2 Ji Toushin (Shouwa 61 nen) [The Second Report (1986)]* [http://wwwwp.mext.go.jp/nep1986/index-84.html] (1986), page unknown.

[13] Shougo Ichikawa, *op.cit.*, p.12.

[14] Katsumi Akao, *Shougai Gakushuu no Shakaigaku [Sociology of Lifelong Learning]* (Tokyo: Tamagawa Daigaku Shuppanbu, 1998), pp.179-180.

[15] J. E. Thomas, Takamichi Uesugi and Shuichi Shimada, *op.cit.*, p.135.

[16] Shougo Ichikawa, *op.cit.*, pp.11-13.

[17] All the Japanese interviewees agreed with this; Christopher P. Hood, *op.cit.*, p.145.

[18] William K. Cummings, Edward R. Beachamp, Shogo Ichikawa, Victor N. Kobayashi and Moricazu Ushiogi eds., *Educational Politics in Crisis: Japanese and American Perspectives* (New York: Praeger, 1986), p.41.

[19] Yukiko Sawano, the interview of 15 April, 2002; Tsuneo Yamamoto, the interview of 17 April, 2002; Hirotoshi Yano, the interview of 21 May, 2002.

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[21] Isao Kurosaki, 'The Origin and Development of Meritocracy in Japan', n.d., unpublished paper.

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[23] Bill Gordon, 'Lifelong Learning in Japan' [http://wgordon.web.wesleyan.edu/papers/lifelrn.pdf]

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[25] Koike and Watanabe (1979) quoted in Iwata, *Gakureki Shugi no Hatten Kouzou [The Structure of the Development of Credentialism]* (Tokyo: Nihonhyouronsha, 1988), p.203.
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CHAPTER FIVE WATERSHED AND REFORMULATION: ENGLAND

1. Introduction

In England, before the formulation of lifelong learning policy, skills shortage had been tackled for many years. This continued through the process of the formulation, and after the creation of the first consultation paper, *Lifetime Learning*. Nevertheless, the country's workforce remained low-skilled and poorly qualified. A range of research, including governmental, non-governmental and academic, came out with convincing findings that the skills deficit remained rigid.

The research questions to be dealt within this chapter are:

When and what was the watershed in the development of lifelong learning policies in England?

How did lifelong learning policies change?

What was the strategy for the implementation of the changed policies?

This chapter suggests that the English lifelong learning policy began changing its shape after New Labour took Office in 1997. Skills development policy, i.e. lifelong learning policy, came to emphasise a need to tackle 'the learning divide'.

The reformulation of lifelong learning policy was undertaken by strong political leadership; also a better economic situation and certain socio-cultural elements contributed to the change in policy.

During these processes of reformulation, as this chapter suggests, the Labour government took certain actions as part of its strategy for the implementation of reshaped lifelong learning policy. The strategy was to target those who were not learning.

The sub-structure of this chapter is as follows: the next section examines the watershed which prompted change to lifelong learning policy in England. The third section is the analysis of the reformulation processes of the policy. The final section summarises the chapter.

The chapter begins with the examination of a turning point in England.

2. Watershed: 'The Learning Divide'

During the Conservative administration, training initiatives were implemented for the skilling of a workforce based on the new liberal principles of the market and individualism. Policy documents repeated a need for learning throughout life for the sake of individual and national benefits. As Allen had already concluded in the 1979, "the 'British Disease' will not be cured by any of the remedies commonly prescribed for it, although they may relieve its symptoms".[1] This was exactly what was happening in the mid 1990s. 'The lack of skills' was exacerbated and 'the learning divide' came to the surface, threatening social justice. This is when, as this section argues, the government acknowledged that something different and drastic had to be done.

The major research and surveys undertaken since 1997 on 'the learning divide' which showed the seriousness of the issue are illustrated here. The Labour administration has been responsive to their findings, indicating a commitment to overcome the imbalance.

It was the National Institute of Adult Continuing Education (NIACE) that first developed the phrase 'the learning divide'. In 1997, the NIACE conducted a UK-wide survey on adult participation in education and learning and published a report, *The Learning Divide*.

It concluded: "the learning divide is as marked today as it has ever been. Age, class, previous educational experience and where you live all affect access to learning, and the confidence to join in".[2] The key findings included:

- three in five of all adults have not participated in the last three years;
- over half of all upper and middle-class respondents are current or recent learners, compared with one-third of the skilled working class and one quarter of unskilled working class people and people on limited in incomes;[a]
- the more initial education and training people receive, the greater the likelihood of their learning later on;
- more than half say that they are very or fairly unlikely to take up any learning in the future;
- 81 percent of people who have done no learning since completing full-time education say they are unlikely to learn in the future.[3]

The survey's detailed outcomes convincingly state that 'the learning divide' is about social exclusion, imbalance, inequity, skills and learning gaps. Although the lack of skills had been identified over and over again before the survey, the findings reestablished that the deficit was a deep-rooted problem in society.

Advisory groups and quangos discussed the root of the problem, the lack of skills. The National Advisory Group for Continuing Education and Lifelong Learning (NAGCELL), chaired by Fryer, argued in its first report *Learning for the Twenty-first Century*: "On the one hand, there are those who are already well qualified and who continue to be learners throughout life. On the other, there are those who either leave education largely unqualified or who neither engage in learning as adults, nor intend to do so."[4] In its summary, the NAGCELL illustrated research findings which confirmed 'the learning divide': NIACE's finding that unskilled and semi-skilled workers are non-participants in

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[a] In this survey, social class is defined by tax codes: AB is upper and middle-class, C2 is skilled working class and DE is unskilled working class and people on limited incomes.

learning in contrast to professionals and managers who tend towards participation in learning; the Dearing Report's conclusion that the participation in higher education of students from unskilled backgrounds is one tenth of those from managerial and professional backgrounds; the finding of the Kennedy Report, that if a person fails in initial education, s/he does not return to learning.[5]

A longitudinal survey carried out by the Basic Skills Agency showed that adults with poor numeracy and literacy were likely to be unemployed or in low income jobs. Parsons and Bynner concluded: "Those who fall behind at school, subsequently miss out early on in the labour market and this further reduces their chances of catching up on the basic skills. Unemployment reduces their opportunities further. As a result, it becomes more difficult to get back on the employment track."[6] It is "a vicious circle"[7] which begins early in life, through education during childhood and to adult working life. Under-represented groups[a] have faced social exclusion and restricted opportunities. Society as a whole should be aware of such inequalities and challenged to achieve change. Skills, information and knowledge can contribute to reduce such inequalities,[8] and lifelong learning has a role to play. This survey showed how complicated the 'vicious circle' was and that simply offering training opportunities would not solve the skills deficit.

Furthermore, on adult basic skills, the impact of *A Fresh Start – Improving Literacy and Numeracy*, the Moser Report, was tremendous. It came up with shocking findings which

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[a] The report lists under-represented groups as: unskilled manual workers, part-time and temporary workers, people without qualifications, unemployed people, some groups of women – notably lone parents, and those on the lowest incomes, those living in remote or isolated locations, some ethnic and linguistic minority groups, older adults, people with learning difficulties and/or disabilities, people with literacy and/or numeracy difficulties, ex-offenders and disaffected young adults, and notably young men.

included the fact that seven million adults were without basic literacy skills.[9] The government and other sectors took the matter seriously and acknowledged the urgency. This can be seen in the Secretary of State, Blunkett's comment: "Sir Claus's report revealed the scale of the problem we face. . . . My Government's committed to doing something dramatic about this."[10] Various reactions followed. The Chairman of the University for Industry (UfI), Lord Dearing, pointed out that "the moral and social issues underlying the Moser findings are far greater" than the figure given in the Report.[11] A Trade Union officer emphasised the importance of the Trade Unions' role to overcome "the Basic Skills crisis".[12] The Qualifications and Curriculum Authority was asked to develop national standards for literacy and numeracy for adults following a recommendation in the Moser Report.[13] The Confederation of British Industry (CBI) pointed out the importance of basic literacy and numeracy not only for employability, but also for achieving fulfilment in all areas of life. The importance of encouraging those with poor basic skills to be active in the workforce was also stressed.[14] In this context, later in 2000, the government published a policy action paper *Better Basic Skills*. It declared commitment to combat the basic skill crisis as "a major issue", not "a quick fix", which has to be dealt with by various sectors of society, from employers to colleges.[15]

In its second report issued in 1999, *Creating Learning Cultures*, the NAGCELL focused on 'culture', which had not been a familiar topic in previous research. The report argued: "far too many people are still locked in a culture which regards lifelong learning as either unnecessary, unappealing, uninteresting or unavailable".[16] With low self-esteem, they feel that 'learning' is not for them because of, for example, bad experiences at school. It was stressed that cultural change requires actions on many different fronts, and at the same time, a variety of different learning cultures should be created since there is no "one best way".[17] 'A learning divide' and "the lack of learning culture" in relation to

under-represented groups – which are also described as the "underclass"[18] population or "the working-class people"[19] – have become important issues in the development of lifelong learning. Their resistance to learning is widely recognised, and the necessity to alter the culture is acknowledged.[20]

There was also a research project which investigated the formation of high and low skills from a comparative perspective. The High Skills Project, funded by the Economic and Social Research Council and operated between 1997 and 2001, identified four national paths to the High Skills Economy which were characterised by competitiveness strategies and systems of skill formation. The UK's skills gaps stood out: "The UK skill formation system generates a bi-polar profile of skills with large numbers qualified at high levels, large numbers with only low level skills and few or no qualifications and a small proportion of the labour force with intermediate level skills and qualifications".[21] Different skill levels match with the competitiveness strategies of different sectors: the "skilled elites" are with high skills and knowledge-based industries, e.g. pharmaceuticals, the media; the cheap, flexible, low skilled and less qualified workforce meets the demand of the industries which compete on price and flexibility.[22] The polarity derives from the decline of manufacturing in which a "craft level skilled", i.e. intermediate skilled, workforce was abundant. Since traditional manufacturing was replaced by "high-tech" and "knowledge-based" industries, labour became polarised between few high skills jobs or knowledge professionals, and low paid staff who may have skills which are unusable in the knowledge-based economy. "A bi-polar profile of skills" continues to produce income inequality based on the division of employment.[23]

These survey and research findings exhibited the reality of skills deficit in the country. Concrete figures – *three out of five* adults are disengaged from learning or *seven million*

adults lacking basic literacy – made the government and the public realise how bad the circumstances were. Certain groups of people, named 'disadvantaged' or 'under-represented', who were not familiar with and were not fond of learning and who had low level or no qualifications, were trapped in 'a vicious circle'. Unless this group of people's circumstances was improved, England's skills deficit would remain unsolved. Drawing on the Moser Report, Dearing expressed the scale of the crisis: "Moser tells us that failure to respond to his agenda [on the lack of adult basic skills] means a continuing cost to the nation of 10 billion pounds a year. Big money."[24] But the crisis is about more than money: "the moral and social issues underlying the Moser findings are far greater than 10 billion pounds a year".[25]

There is an indication that the rise in the number of these disadvantaged groups began with the end of full employment and continued throughout the years of the dismantling of the welfare state, i.e. from the Thatcher years to the present day. By the late 1990s, the UK had nearly 14 million people who were in "absolute poverty". These people are called the underclass, and this phenomenon is termed "new poverty". What is 'new' about 'new poverty' is that the impact on the 'underclass' has become more acute than in the recent past, because they have expectations not only of material changes, but also of "qualitative changes in the status and social relations".[26] In the knowledge economy where the latest knowledge and skills are demanded, the 'underclass' population who already are in 'new poverty' and who already have problems in basic skills have little chance to reach the mainstream labour market and to change their lives. Additionally, in the knowledge economy, "the digital divide"[27] came to be identified as a new type of divide which exacerbates skills gaps.

When New Labour came to power in 1997, they perceived that the country was facing

the seriousness of prolonged skills deficiency. This was the watershed. In addition to low-skilled and low-qualified workforces, the new critical point – 'the learning divide' – was acknowledged. Policy strategies to improve skills deficit were not only not working, but were also promoting gaps in society. As the above examples of research and surveys show, it was the Labour government which identified 'the learning divide' as a top agenda in social reform and that have tackled the problem, conducting further investigations and responding to their hard evidence. As a result, the Labour government's measures since 1997 have placed more emphasis on social agendas than the previous administration.[28] Social cohesion and inclusion, adult basic skills, community regeneration and citizenship have been discussed as important components of lifelong learning policy.

This section has investigated the first research question – *when and what was the watershed in the development of lifelong learning policies?* This chapter now turns to discuss lifelong learning policy after 1997 in answering the second question – *how did lifelong learning policies change?*

3. Policy Reformulation

1) Third Way Component

New Labour locates lifelong learning as an important part of its new political vision – the Third Way. New Labour was aware of the consequences of too much emphasis on the new liberal principles – privatisation, marketisation and individualisation – emphasised by Thatcher and carried over by Major in the previous Conservative administrations. This section suggests that the current "dual commitment",[29] i.e. both economic and social concerns, which can be seen in lifelong learning policy is original to New Labour, although the economic dimension was taken over from the previous administration. Lifelong

learning is an important component of the Third Way.

According to Giddens, the key characteristics of the Third Way are: "the radical centre, the new democratic structure (the state without enemies), active civil society, the democratic family, the new mixed economy, equality as inclusion, positive welfare, the social investment state, the cosmopolitan nation and cosmopolitan democracy".[30] To adjust to the changing world of "globalisation and self-reflexivity", the Third Way is the "appropriate" form of "a coherent and distinctive reconstruction of the state, civil society and welfare".[31] Giddens argues that the Third Way programme:

> involves moving beyond the old dualism between state and civil society – in which government is either the solution or the problem, and accepting a new version of government which will renew civil society through increased democratisation, greater transparency and experiments with democracy. It should be based around the notion of community and draw on voluntary sector involvement as well as creating a new mixed economy through synergizing public and private sectors. . . . the third way should abandon the egalitarianism of old left and the acceptance of inequality within the new right and replace these with the concept of inclusion.[32]

The notion of 'inclusion' is a fundamental tenet of the political ideology of New Labour.

According to Hodgson and Spours, the Third Way's political philosophy is first, "investment in knowledge and skills will provide the essential foundation of both individual employability and the competitiveness of an economy based on high value-added goods and services which are tradable in the global market-place"; second, "labour market flexibility will ensure that the British economy can create jobs on a sufficient scale to tackle social exclusion"; and third, welfare reform in tackling social exclusion should be a means for bringing the excluded "back into work" rather than "a safety net".[33] The Third Way sees the state as a "social investment State", and lifelong learning as a strategic measure to realise a 'social investment State'. As Hodgson and Spours put it, lifelong

learning is "the key to the development of an inclusive and just society whose economy is successfully competitive in the global market-place".[34] Lifelong learning is seen as both a means and an end in providing education and training, employment and social inclusion.[35]

The view that a significant change in the development of lifelong learning policy in England occurred after Labour came to power in 1997 is widely noted.[36] The impetus of lifelong learning policy can be identified at the end of 1980s; the need for continuous reskilling and upskilling for competitiveness was recognised due to prolonged economic stagnation, and the rapid advancement of technologies and changing employment modes. The notion was described as 'lifetime learning', which referred to young people and adults, either employed or unemployed. In the final years of the Conservative administration, as a DfES official, Down[a] indicates, this slogan was emphasised, and a lot of discussion was taking place in political, economic and academic circles, although not much record can be found about the discussions.[37] Skills development as a main part of lifelong learning was included in the 1997 Labour Manifesto:

> We must learn throughout life, to retain employment through new and improved skills. We will promote adult learning both at work and in the critical sector of further education. . . . Employers have the primary responsibility for training their workforces in job-related skills. But individuals should be given the power to invest in training.[38]

But after coming into office, Labour's approach changed. The systematisation of lifelong learning in policy terms first began with New Labour.[39] New Labour's Third Way treated lifelong learning as an essential component of educational and social reform. Social aims

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[a] The Head of Access to Learning for Adults, Adult Learning Group, Lifelong Learning Directorate, DfES.

– social inclusion, widening participation, citizenship and 'a culture of learning' – were included in the first substantial document on lifelong learning policies, *The Learning Age*.[40] Nothing like *The Learning Age* had been conceived of before.[41]

The Third Way emphasises that the 'social investment State' functions on the basis of "triangle responsibility",[42] i.e. partnerships between the government, employers and individuals. The previous Conservative administration aimed to minimise the involvement of the state so as to increase individuals' and employers' responsibilities for learning and training. The general view was that it was up to individuals and employers to identify their skills needs and to cope with them.[43] The current government has a different approach. Labour recognises that the government has a role to play – not necessarily by putting in money, but by targeting where money should be spent. One of the differences in approaches between the two administrations is that as a target for an adult workforce, admitting that "our weakness lies in our performance in basic and intermediate skills",[44] the Labour government targets NVQ Level 2, but the previous administration targeted Level 3.[45] New Labour's approach can be criticised through its element of compulsion, i.e. forcing the disadvantaged to obtain basic skills to bring them out of poverty.[46] For these people, lifelong learning can sound like "a prison sentence".[47] However, Labour's belief is that it is the government's responsibility to make society inclusive by improving the circumstances of the disadvantaged population and that for them, learning is "a passport out of poverty".[48]

As well as governmental responsibility, the other two of the members of 'triangle' also carry responsibility. Individual responsibility is about choosing a suitable learning opportunity, undertaking learning and making learning achievements. A clear distinction between the role of the government and individual responsibility is drawn:

> the government's role will be to help create a framework of opportunities for people to learn and to lift barriers that prevent them from taking up those opportunities. We cannot force anyone to learn – individuals must take that responsibility themselves – but we can help those who want to develop a thirst for knowledge.[49]

The message is that the government is there to promote and support individuals' learning and employers' training. But after providing a variety of learning opportunities and making information available, the choice is left up to individuals.

The third member of the 'triangle' is the employers. The Labour government aims to build a collaborative working environment at national, regional and local levels to meet the needs of businesses. At the national level, quangos such as the LSC, the Sector Skills Development Agency, the Qualifications and Curriculum Authority, the Basic Skills Agency and advisory bodies to the Secretary of State for Education and Employment such as the National Skills Task Force have been established, and schemes such as University for Industry (UfI), Investors in People (IiP), Learning Partnership and Small Firms Training Loans[50] have been promoted. At the regional level, nine Regional Development Agencies continue to play a part in achieving regionally balanced economic growth.[51] At the local level, local LSCs, Sector Skills Councils have been tasked to bring employers into the decision-making process on skills, business development and productivity performance.[52] An example in the area of community development is the Adult and Community Learning Fund which aims to widen participation in learning and improve standards of basic skills.[53]

The English approach to the building of partnerships is often termed as "a voluntary market-led system"[54] since there is no levy on employers.[55] An important measure used to achieve cohesion and equilibrium in society is the large-scale partnerships which emphasise the equal responsibilities of the government, individuals and partners. This is

the 'triangle responsibility' and is based on individualism.[56] However, the view that learning is for not only economic ends, but also social purposes, e.g. social inclusion, is an innovation under Labour[57] in comparison with previous Conservative governments. Lifelong learning is the general philosophy of Labour.[58] Lifelong learning sits comfortably within the principles of the Third Way, and the Labour government emphasises this.

2) David Blunkett as Advocate

If there is a particular politician who influenced the construction of the ideology of lifelong learning in the Third Way, it is the (then) Secretary of State for Education and Employment, David Blunkett. He treated adult and continuing education and family learning as equally important as formal education. He believed in "the power of learning", particularly, "learning for the second chance". That was because as Blunkett describes: "I gained my qualifications through day release and evening classes".[59] He himself came via "the hard route", not the elitist route as is the case of the majority of politicians.[60]

The strong humanistic essence of *The Learning Age* – the first substantial policy document on lifelong learning issued in 1998 – and its uniqueness as a policy document are often emphasised.[61] There is a view that such characteristics stem from Blunkett's own philosophy, and that can be identified in the Green Paper:[62]

> We are fortunate in this country to have a great tradition of learning. We have inherited the legacy of the great self-help movements of the Victorian industrial communities. Men and women, frequently living in desperate poverty, were determined to improve themselves and their families. They did so through the creation of libraries, study at workers' institutes, through the pioneering efforts of the early trade unions, at evening classes, through public lectures and by correspondence courses. Learning enriched their lives and they, in turn, enriched the whole of society.[63]

There were only seven months between the 1997 General Election and the completion of *The Learning Age* in 1998. This was an intensive and important moment. As soon as

Labour came to power, Blunkett set up a commission to consult on adult and continuing education, which sought opinions from a wide range of audiences.[64] Blunkett was a powerful politician who made the DfEE one of the most powerful government Departments,[65] locating 'lifelong learning' as central to social reform.

The result, *The Learning Age*, encompassed the broader notions of learning and the concerns about cohesion and equilibrium. Compared with *The Learning Age*, *Lifelong Learning*[66] – Labour's consultation document created a year before the General Election – had not yet developed the social dimension of lifelong learning in policy terms. There was an emphasis on quality, wider access, equitable funding and their accountability, but the major interpretation of lifelong learning was as learning for the sake of upskilling and reskilling, which was a legacy from the Conservative government. It is likely that social concerns were developed in the seven-month period after Labour came to power in 1997.

The Learning Age is concerned that society has become divided "between the information rich and the information poor"[67] or between those who can enjoy the privilege of learning and those who have obstacles which prevent them from learning.[68] The division creates a group of people with low skills and poor qualifications, who are "locked in a cycle of disadvantage".[69] The Green Paper declares that: learning "lies at the heart of the Government's welfare reform programme". [70] "The development of a culture of learning will help to build a united society, assist in the creation of personal independence, and encourage our creativity and innovation."[71] The first NAGCELL report's argument, "the need for a change of culture", was fed into *The Learning Age.*[72] The Green Paper argues the importance of this change of culture:

> Learning offers excitement and the opportunity for discovery. . . . Learning helps create and sustain our culture. . . . Learning increases our earning power,

> helps older people to stay healthy and active, strengthens families and the wider community, and encourages independence. . . . learning contributes to social cohesion and fosters a sense of belonging, responsibility and identity.[73]

"Our vision is to build a new culture of learning which will underpin national competitiveness and personal prosperity, encourage creativity and innovation and help build a cohesive society."[74] To build this culture, there is a need to "tackle social exclusion at its roots within the education system both before and beyond the school leaving age".[75] 'The Learning Age', therefore, moves beyond formal schooling and is about more than competition and employment. "Learning has a major contribution to play in sustaining a civilised and cohesive society."[76] The interpretation of 'lifelong learning' has been extended from 'continuous skilling' to 'culture' in which various sorts of learning are encompassed.

Another aspect that illustrates Blunkett's influence on lifelong learning policy can be found in the change that has occurred since the reshuffle of the Administration and Blunkett's departure from the DfEE in 2001. When Blunkett was the Secretary of State for the DfEE, the balance between social and economic aspects was maintained. But since his departure from the DfEE, lifelong learning has lost emphasis.[77] Fryer points out that the discussions on social inclusion, wider benefits, civic engagement and citizenship are disappearing.[78] Morris,[a] who succeeded Blunkett, focused on primary and secondary education and was less interested in lifelong learning, and its policy development slowed down.[79] Clarke, the current Secretary of State for Education and Skills in 2003, appears to be even less keen on lifelong learning. The current "priorities"

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[a] In October 2002, Estelle Morris resigned as the Secretary of State for Education and Skills, and Charles Clarke took over the post (DfES, 2002, http://www.dfes.gov.uk/pns/DisplayPN.cgi?pn_id =2002_0199).

of the DfES for the coming four years[a] do not even include the term, 'lifelong learning'.[80]

Furthermore, a post in the DfES entitled Parliamentary Under Secretary State for Lifelong Learning (Lifelong Learning Minister) was created during Blunkett's time as Secretary of State, and Howells,[81] Mudie[82] and Wicks[83] were appointed to the post in 1997, 1998 and 1999 respectively. However, this post was terminated in 2001 when Morris became the Secretary of State. Since then, the responsibility for lifelong learning has been shared between the Minister of State for Lifelong Learning and Higher Education and the Parliamentary Under Secretary State for Young People and Basic Skills.[84] It can be suggested that this shift results from the change of a Secretary of State from Blunkett – who had been enthusiastic about the development of lifelong learning – to Morris – who was less committed to lifelong learning.

Blunkett was also keen on the development of the relationship between government and the research community. The Learning Society Programme run by the Economic and Social Research Council (ESRC) was undertaken to gain "a body of knowledge" required to create a learning society. The Programme had already begun in 1994,[85] but it became active after Blunkett took it over, issuing three challenges: first, "to study issues 'central and directly relevant to the political and policy debate'"; second, "to 'take into account the reality of many people's lives'"; and third, "to engage open-mindedly with policy rather than be 'driven by ideology paraded as intellectual inquiry or critique'".[86]

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[a] They are: "providing high-quality early education and childcare for more children"; "continuing the progress already made in primary education"; "transforming secondary education"; "developing a flexible and challenging 14-19 phase of education"; "increasing and broadening participation in higher education"; and "developing the skills of the workforce - particularly the basic skills of some adults" (DfES, 2003, http://www.dfes.gov.uk/findoutmore/).

It is not easy to draw a conclusion about the extent to which a politician has contributed to a particular policy, but it can be argued that the personality and beliefs of policy-makers have an influence on policy. In the case of English lifelong learning policies, its social and spiritual aspects benefited from the support of the former Secretary of State, Blunkett.

3) Recovering Economy

Public policy reflects political contexts, but it is also influenced by economic circumstances. An obvious example is, as illustrated earlier, the vocational training policies in the 1970s and 1980s which largely stemmed from the high level of youth unemployment. In the mid 1990s just before the General Election, the domestic economic situation was recovering. Hence, this section suggests that Labour had a public expenditure margin, which could be allocated to the development of lifelong learning.

The Conservative governments between 1979 and 1997 had to deal with continuous economic difficulties.[87] The prioritised and immediate issues involved the unemployed. Funding was allocated for their training so that they could enter the labour market. Between the end of the 1980s and the beginning of the 1990s, discussions on lifelong learning began emerging, but disappeared again during the recession.[88] However in the mid 1990s when the economy started to recover, the skills gap became visible and the problems of lifelong learning were discussed again. The whole emphasis of policy changed only when the economy recovered.[89] The 1997 annual report of the HM Treasury illustrated improved economic circumstances during the first half of the 1990s: "Gross Domestic Product (GDP) grew by 2.6 per cent in 1996. Unemployment continued to fall and by December 1996 was over one million below its peak in December 1992.

The current account of the balance of payments remained close to balance."[90] Analysis in the OECD's economic survey of 2002 shows that: "the United Kingdom's macroeconomic performance has been robust. Growth has slowed only little so far and unemployment has declined further than most observers expected, without ignoring inflationary pressures."[91] Thus, since 1997, the Labour administration has had a relatively stable economy. The coincidence of this economic event with the watershed identified in the first section of this chapter is relevant and should be noted.

The stable economy has had two implications in relation to the development of lifelong learning policy. The first is that there were more resources available when Labour came into office, as Taylor puts it: Labour had "a much easier ride".[92] When the domestic economy is doing well, the labour market becomes buoyant. The government aims to fill the jobs which require new knowledge and skills.[93] Benefiting from the good economy, the government is able to afford education and training. Secondly, as the level of employment improved, more workers were "scooped" into employment, including many under-skilled workers;[94] the low-skilled population formed part of the workforce.[95] In this situation, skill gaps become visible, and the government recognises that there remains an urgent need to upskill the workforce. These two aspects of the recovering economy in the years around 1997 prompted the concrete discussions on lifelong learning in policy terms.

Since the economy had recovered and the Budget did not have to focus on unemployment issues, Labour was able to put money and time into the development of lifelong learning policy. So far, the political and economic processes of policy reformulation have been analysed in this section. There are, however, more fundamental features about English society that have contributed to the reshaping of

lifelong learning policy. This is the subject of the following two sections.

4) Emphasis on Audit

Borrowing Power's words, this section argues that an aspect of English society, as "an audit society",[96] has been influential in the development of lifelong learning policy. It is first worth discussing the meaning of the term. According to Power, 'an audit' is "a certain set of attitudes or cultural commitments to problem solving", and therefore, 'an audit society' refers to "the tendencies revealed by these commitments rather than an objectively identifiable state of affairs". "Audit is an idea as much as it is a concrete technical practice and there is no communal investment in the practice without a commitment to this idea and the social norms and hopes which it embodies."[97] Acknowledging the "fuzziness" of the term, Power indicates that 'an audit' or 'auditing' is "not used simply *descriptively* to refer to particular practices, but *normatively* in the context of demands and aspirations for accountability and control".[98]

In the UK, there has been an "audit explosion" since the late 1980s, which deriving from the emergence of "New Public Management" that has demanded "transformations in conceptions of administration and organization which . . . dismantle the public-private divide". As the role of the state shifts to "an indirect supervisory role", auditing comes to acquires "a decisive function":[99]

> By virtue of pushing control further into organizations, relying on the cognitive and economic resources of self-control, markets for internal and external auditing have been created to satisfy the need to connect internal organizational arrangements to public ideals. The forms in which these markets have developed are different but they all have something to do with making individuals and organizations accountable, that is, they require the giving of 'auditable accounts'. . . . Audit has become a benchmark for securing the legitimacy of organizational action in which auditable standards of performace have been created not merely to provide for substantive internal improvements to the quality of service but to make these improvements externally verifiable via acts of certification.[100]

"Value for money audits" have become a norm in English society. Programmes and 'value for money audits' have come "to shape the performance of the auditee in terms of economy , efficiency, and effectiveness". The UK National Audit Office and the Audit Commission play a large part in the interpretation as well as the implmentation of public policies.[101]

In 'an audit society', "auditable accounts" are placed in an economic context, hence, an influential component of 'an audit society' becomes the financial dimension. In terms of the provision of education, training and learning, as it is a public service, auditing has come to be increasingly emphasised. In England, the authority of the HM Treasury is significant since it allocates funding to public policies including lifelong learning policies. England has been a high tax and high spending country. The current Labour government in particular, is "a spending government",[102] but without direct tax increase. Currently 40 percent of the GDP is derived from tax, although the figure used to be 50 or 60 percent. Hence, as a DfES official, Edmeades[a] indicates: "There is huge pressure to reduce costs. The public sector is chasing to get resources."[103] Economic rigour, i.e. 'value for money', has become the rationale of public spending. Public policies have to be justified to Treasury as part of the Comprehensive Spending Review on economic grounds.[104] In Ainley's words, "contracts" are made between individual Departments and Treasury; "contract culture" has permeated England.[105]

In the 1998 Comprehensive Spending Review, the Chancellor of the Exchequer indicated the intention to invest in the future with modernisation and reform: "In the old economy it was possible to survive with an education system that advanced only the ambitions of the

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[a] He is in the Strategy and Funding Unit, Lifelong Learning Directorate, DfES.

few. The new economy demands an education system that advances the ambitions of all."[106] The Review set two overarching goals, "an inclusive society" and "a globally competitive economy",[107] which have been the central aims of the development of lifelong learning. Under the goals, the DfEE was given three major Departmental objectives:

- Ensuring that all young people reach 16 with the skills, attitudes and personal qualities that will give them a secure foundation for lifelong learning, work and citizenship in a rapidly changing world;
- Developing in everyone a commitment to lifelong learning, so as to enhance their lives, improve their employability in a changing labour market and create the skills that our economy and employers need;
- Helping people without a job into work.[108]

The balance between inclusive and economic themes can be seen, although lifelong learning only refers to post-16. The latest 2002 Spending Review sets six Public Service Agreements (PSAs) for 2003 to 2006 for the DfES. They are to:

- raise standards in English and maths in primary education;
- raise standards in English, maths, ICT and science in secondary education;
- pupil inclusion;
- raise attainment at 14-19;
- improve the skills of young people and adults and raise participation and quality in post-16 learning provision;
- tackle the adult skills deficit.[109]

PSAs, which started in 2000, are the detailed outcomes that the Departments are expected to deliver within their budgets. PSA targets are set for the government to monitor the progress of each Department and for Parliament and the public to evaluate achievements of the Departments. Treasury's Spending Reviews are made against PSAs.[110]

The above objectives are put into detailed PSA targets. The targets for the post-16 sector are:

- By 2004, at least 28 per cent of young people to start a Modern

Apprenticeship by age 22;

- Improve the basic skills of 1.5 million adults between the launch of Skills for Life in 2001 and 2007, with a milestone of 750,000 by 2004; and
- Reduce by at least 40 percent the number of adults in the UK workforce who lack NVQ level 2 or equivalent qualifications by 2010, with 1 million adults in the workforce to achieve level 2 between 2003 and 2006.[111]

The PSA targets show the Treasury's focus on skills and qualifications which lead to employment and will benefit the labour market. The DfES has to achieve the targets.

Treasury has always played a large part in policy-making in England. Moreover, the current government has an even stronger Treasury because of the powerful Chancellor of the Exchequer, Gordon Brown,[112] who has had a strong belief in the link between education and skills, and economic growth.[113] Treasury has authority over the control of the economy and public spending. Unless each Department makes a strong economic contribution in spending, the Department will not be provided with a budget. The DfES is not exceptional. If the investment in a lifelong learning policy has no economic aims, funding is hard to obtain.[114] Labour, in the second administration after 2001, has come to concentrate on targets and consequences rather than structures. The government is concerned with what 'customers' get. The PSA targets are a way of measurement. The targets have to be measurable for the government's "public image"[115] and more importantly, for accountability.

Thus, in 'an audit society', it is a prerequisite that education and lifelong learning policy aim towards economic growth, and therefore, measureable targets are required. Hence, social inclusion policy and other policies which address social concerns also have to contribute to the economy, one way or another. According to a DfES official, Edmeades, more funding is being allocated to the adult education arena,[116] which indicates that the government's commitment to social agendas is not rhetorical but substantial. However,

there are indications which show that social agenda is being dealt within the framework of economic aims. The government's reaction to the Moser Report indicates the underlying perception that skills matter to economic performance: "Poor basic skills are one of the main contributory factors to a cycle of poverty and disadvantage which is passed on from generation to generation."[117] The implication of 'seven million adults without basic skills' on economic performance and ultimately, on state sustainability is of concern. Skills development – lifelong learning – to combat 'the lack of skills' and 'the learning divide' for the sake of economic performance is repeated thereafter. Some examples should be illustrated here.

A White Paper on post-16 learning, *Learning to Succeed* reemphasised the weakness in relation to employability, competitiveness and the level of qualifications: "There are too many people with few, if any, qualifications and too many with low skills."[118] The importance of qualifications, for example, are explained in the following terms: "Those without qualifications earn 30% less than average earnings"; "the earnings of people with degrees are double those of people with no qualifications"; and "the unemployment rate of those with no qualifications is more than three times that of graduates".[119] The government's belief is that qualifications have a direct correlation to employability. With the low qualification level, competitiveness against international rivals is questioned. "We must develop a new approach to skills, and to enabling people, and businesses, to succeed. . . . The challenge is urgent."[120] 'Success' largely refers to better economic performance and competitiveness in comparison with international competitors. Therefore, to succeed, a high-skilled workforce which has a high level of qualifications is necessary. In other words: "Above all, we aim to modernise learning and skills for the economic challenges of the new century",[121] the era which is characterised by:

> the transformation of the basis of economic success from fixed capital investment, to human capital. In a knowledge-driven economy, the continuous

> updating of skills and the development of lifelong learning will make the difference between success and failure and between competitiveness and decline.[122]

People's skills are the biggest determinant of the vitality and cohesion of society as well as economic prosperity.

One of the earlier examples of implementation of skills development is the New Deal,[a] which was created to help the unemployed into work and to close the gap between the skills that employers want and the skills that people have. "It's a real opportunity to get people off benefits and into work. . . . New Deal benefits everyone. Employers get new talent for their business. People get new skills, new opportunities and a new start. We all benefit from a more successful economy and a vibrant community."[123] Another large-scale measure is the University for Industry (Ufi) Limited, which is run between government and the private and public sectors. Operating in partnership with learndirect, a publicly-funded online learning service network, Ufi provides learning opportunities for the post-16 sector in general as the Open University does for the higher education sector. Ufi aims to enhance people's employability, and organisations' productivity and competitiveness.[124] Moreover, "targets" were set "to make Britain more competitive internationally" and also, to promote "social cohesion":[125] e.g. the National Advisory Council for Education and Training Targets (NACETT).

The emphasis on skills in the social agenda has continued to increase. In *National Strategy for Neighbourhood Renewal* issued by the Social Exclusion Unit, it is suggested that the cause of neighbourhood decay is economic: "The cycle of decline for a

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[a] Under the new organisational structure since 2001, the Department for Training and Industry is in charge of New Deal.

neighbourhood almost always starts with a lack of work."[126]

> Mass unemployment and the closure of particular industries have devastated communities. . . . Many neighbourhoods have been left almost entirely dependent on state benefits and public money. . . . Poverty and unemployment exacerbate a whole range of other social problems.[127]

Therefore to revive local economies, agendas such as "improving adult skills" and "helping people from deprived areas into jobs" are prioritised.[128] The underlying concerns of the government are economic growth, increased productivity and competitiveness.[129] Such an economic end within social concerns can be seen in Tony Blair's comment when he set up the Social Exclusion Unit. The aim of the Unit was to deliver "real change" towards "revived economies, safer communities and high quality public services".[130]

More straightforwardly, in a speech 'Education into Employability: the Role of the DfEE in the Economy',[a] then Secretary of State Blunkett stressed: "A robust and respected, world class vocational and technical education" is needed for "a better-skilled workforce", and at the same time, everyone should have basic literacy and numeracy so that they can be trained for employability.[131] Hence, the role of the DfEE is: the setting up of "a coherent framework from school through to further and higher education through to employment and lifelong learning"; the creation of "a labour market that is both flexible and fair" and the provision of "the skills to prosper in the modern economy" to citizens.[132] As Ainley points out, New Labour's aim is "work, work, work", i.e. the increase of "employability",

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[a] 'A seamless approach to education and employment' is emphasised based on a 'post-Keynesian' approach which reinforces one of Keynes' principles: "where government invests, it should do so to promote demand and growth". Blunkett argued that a new economic imperative of the supply-side investment enhanced productivity and economic performance. Once incomes start to rise, demand will respond to the enhanced supply side of the economy. The labour market will then become efficient, and the economy will be able to cope with increased demand with stability.

rather than "education, education, education".[133] The education administration's important part in economic prosperity can thus be identified.

The tendency to stress qualifications and targets gathered momentum. For example, in a consultation paper of 2000 *The Excellence Challenge*, strategies are set to expand the higher education access, and one of the concrete targets says, "by 2010, 50% of young people should have the opportunity of benefiting from higher education by the time they are 30".[134] Higher education degrees are treated as important for social inclusion as well as for economic competitiveness and productivity. "A danger" is indicated: a lifelong learning approach to social inclusion is over-individualised, over-regulated and over dependent on access to the formal education system, particularly higher education.[135]

As for the young people's vocational track, Modern Apprenticeships[a] have been developed. The scheme is to benefit not only young people, but also employers. It is aimed to give young people working experience in the real world and learning at the same time and to enable them to gain skills and qualifications which are recognised nationally so that they can start working soon. It is also aimed to provide employers with direct access to motivated young people who are to obtain skills within a structured qualifications framework which meets the needs of the industry.[136] However, there are criticisms of Modern Apprenticeships; for example, Unwin and Wellington indicate that Modern Apprenticeships create "a clear hierarchy" within the vocational pathways – Modern Apprenticeships, "national traineeship" and "other training" – just as "the

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[a] Modern Apprenticeships are available at two levels: Foundation Modern Apprenticeships and Advanced Modern Apprenticeships. The Foundation Modern Apprenticeship leads to National Vocational Qualification (NVQ) Level 2 and the Advanced Modern Apprenticeship to NVQ Level 3. NVQs are important recognised qualifications since they set skills standards in the industry (DfES, 2002, https://www.realworkrealpay.info/LSC/LSC_youth/About_MA/default.htm).

academic pathways" do. They argue that it is a big "challenge" to put one third of young people who do not wish to continue full-time education after the age of 16 into "a work-based alternative". But the country has to produce more "technician level employees", i.e. a high-skilled workforce, out of "the work-based route" since the academic route has failed to do so. On the basis of research findings, Unwin and Wellington go on to argue that "re-branding of courses" or putting forward "special measures" do not solve "deep-seated problems" such as skills shortage and youth unemployment.[137] Despite these grounded criticisms, both in academic and vocational routes, qualifications and targets have been the measurement of standards and higher skills.

The rush to define qualifications and the creation of targets are to reskill and upskill young people and adults to achieve better economic performance. Taylor, a retired government official, even argues that the real thrust of all movements of lifelong learning is "to get people to attain qualifications".[138] It is a solid argument since the government has constructed funding systems situating qualifications as "outputs" as Hillage *et al* indicate.[139] However, they warn that qualifications "may have served as a deterrent rather than an incentive to learn".[140] The acceleration of the focus on results is, borrowing the words of Down, a DfES official, Labour's "obsession of delivery".[141] Since 2001, the administration has come to focus more on delivery but with fewer targets.[142] The Delivery Unit is established in the Cabinet Office "to ensure that the Government achieves its delivery priorities during this Parliament across the key areas of public service: health, education, crime and asylum, and transport".[143]

At the local level as well, the obsession with delivery is recognised; Langton[a] of the LSC London East points out that to deliver efficiently and effectively, the govenment has become more strategic and also more demanding, looking at "high quality and value for money". The government approach used to be "you grow, here is the money", but currently they pose the question, "you grow, then in which way?".[144] The pursuit of effective and efficient delivery is emphasised in *Success for All: Reforming Further Education and Training*, the second remit letter to the LSC. At the local level, "how does it fit into the local circumstances" is questioned.[145] Each local LSC is asked to find out its own skills needs, to match the supply and demand of skills and to develop its own education and training infrastructure with local employers and educational institutions.[146] DfES and other Departments are obsessed with delivery because they have to meet their PSA targets.

The connection between the social side of lifelong learning policy and an economic end is often disputed. A large part of the commentaries criticise either the government's manipulation of social agendas or the government's optimistic treatment of social inclusion. According to Ball *et al*, what is happening in England is, "the sublimation of 'learning policy' within economic policy via concepts like the 'learning society'"[147] or 'social cohesion'. "The central, over-riding concern" of "meeting the skill needs of business in order to improve the economy" – "an uninspiring utilitarianism" – is criticised by Coffield.[148] Avis points out that New Labour's attempt for radical social democracy goes beyond "a new moral economy centred upon individualism held together under the banner of a socially inclusive and globally competitive society".[149] "Social inclusion is predicated upon employment"[150] with a "clear cut relation between the development of

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[a] The Director of Strategic Development and Quality, the LSC London East.

human capital and economic competitiveness".[151] The National Association of Teachers in Further and Higher Education (NATFHE) also criticises "the over-reliance on competition and market forces".[152]

Drawing on Bynner and Tight, Selwyn *et al* argue that: "it is clear that the present lifelong learning agenda is economically focused, and that any concern with the socially excluded can be more accurately seen as a concern with the economically excluded".[153] Wolf as well, agrees that: "Lip-service may still be paid to learning for personal enrichment and development, but in politicians' speeches the emphasis is unremittingly on what education can do for the economy of the UK".[154] These critiques share the view that on the basis of a "very immediate and specific pattern of cause and effect", learning is targeted to contribute directly to the labour force and economic productivity.[155] Despite the emphasis on social inclusion, New Labour's underlying concerns are economic growth, productivity and competitiveness. In Tight's words: "Lifelong learning is not about all learning, nor is it lifelong."[156]

There is a view that there has not been a fundamental change in stressing learning for economic purposes since the previous Conservative administration. As Halpin suggests, "Labour has retained much of the previous Tory emphasis on the education market place".[157] Labour's approach was, as Hodgson and Spours put it: "the Conservative legacy".[158] The legacy is also identified by Power and Whitty, who argue that: "Relabelling the processes of marketization and privatization under the new more fashionable discourse of mutuality and partnership does little to address the very real concerns about access to and adequacy of provision that emerged during the Conservative years."[159] And Payne argues that the New Labour has taken "supply-side logic" over from their Conservative predecessors.[160] The major interpretation of lifelong

learning – skills development for everybody throughout life – has remained unchanged since a decade before, when policy debate began.

The government's optimistic use of lifelong learning is, as Rees *et al* put it, a "single-minded version" of 'a learning society'; once the "barriers" which prevent people from participating in education and training is removed, 'a learning society' will be achieved in which workers with up-to-date skills are able to engage in knowledge-based forms of production.[161] Tight points out that the logic is "the dominant discourse: as presented in the government's consultative paper; as articulated to a greater or lesser extent, in the Kennedy, Dearing and Fryer Reports; and as supported by the data presented in the NIACE survey report".[162] Edwards *et al* warn of the exclusion of "possible alternative analyses of the situation" in the "simplified causal relationship" of positioning education and learning as the "root" of exclusion/inclusion.[163]

The argument of optimism leads to what Taylor and Hodgson claim: "a narrow concept".[164] Narrowness is about positioning skills development as the main component of lifelong learning. Narrowness is about the target group which is young people and adults. Narrowness is also about a "market-led" [165] approach or "free-market ideologies" [166] which treat lifelong learning as an economic strategy. Moreover, narrowness is about the rush towards qualifications which used are to quantify 'learning' outcomes. Because of the narrow aim and target of lifelong learning, what 'learning' means is limited to obtaining vocational, accredited, transferable or entrepreneurial skills.[167] But what these skills actually are is not fully discussed – as Payne argues that the use of the term 'skills' is too dispersed, e.g. basic skills, management skills, employability skills.[168]

New Labour's concern for the disadvantaged population is acknowledged, but its over-simplicity is disputed. What these critiques lead to is that the issue of social inclusion is more complicated than the way in which New Labour understands and deals with it. A large increase in the participation rate in the post-compulsory sector can be identified in the past decade.[169] However, the increase did not mainly come from traditionally non-participating groups.[170] "The gap between the educational 'haves' and the 'have nots'"[171] is becoming wider after two decades of the practice of widening participation. The government is concerned with the low-skilled workforce and the skills deficit amongst certain groups of people. But the current strategies to reform the circumstances with many of training initiatives do not seem to be necessarily appropriate.

Thus, economic benefit is the philosophy that lies behind the development of lifelong learning in England. The critiques of the strong link between social inclusion policies and the economy can be summarised in a view offered by OECD: there is "still the need for the UK to understand social exclusion more clearly in terms other than the job market".[172] However, it is too harsh to conclude that it is only the economy which interests the government. It has, borrowing Langton's words, a "dual commitment":[173] productivity and competitiveness *and* regeneration and social inclusion are substantial concerns.[174] The government considers that the country needs both. But the critiques emphasise that social concerns converge on economic ends. The economy in England has to be a knowledge-based economy, therefore the country cannot afford the population to be disengaged from learning – most of them had bad experiences in compulsory education.[175] The disadvantaged population are usually recipients of benefit, do not have a job, and could stagnate in poor circumstances.[176] The government is determined to motivate this population, to educate and train them and to make better lives for them.[177]

As Edmeades, a DfES official, indicates:

> Ministers aim to give the marginalised opportunities to learn. The Cabinet Office Report last year targets supporting adults with low skills, and the Chancellor announced a pilot for low skills. Coupled with basic skills policies, these are the priority at the moment.[178]

By targeting "who is not learning"[179] or who is "disengaged"[180] from learning, the Labour government aims to provide these people with skills and bring them into the labour market. By doing so, it is believed that an individual's life will become financially easier, employers will benefit and the local and national economies will improve. Learning – i.e. obtaining skills – is necessary for everyone for employment and for economic performance. The country has to overcome the weakness of skills shortage, to compete against other international rivals and to prosper in the global economy. The government has explicitly indicated its emphasis on skills development and economic growth and competitiveness, by targeting 'who is not learning'.

However, this strategy of differentiating 'have nots' from 'haves' has had the effect of consolidating the learning gap. The needs of industry and short-term vocational goals have been important in the development of lifelong learning policy, and those needs are the ones which have been identified to receive funding.[181] In contrast, the humanistic dimension of learning presented in *The Learning Age* – learning from cradle to grave, learning for the sake for learning, learning for leisure – has been less emphasised in policy implementation. This is largely to do with Treasury's control over lifelong learning policy. 'The obsession with delivery' derives from concern about the accountability of public services, with pressure coming from the Treasury. Its power over public spending and the focus on the economy have influenced the priorities of the lifelong learning policy.

Thus, education and the economy have been correlated in England through the power of

the Treasury; however, recently, this assumption has come to be questioned. In doubting whether education is "the elixir of economic growth"[182] Wolf discusses in detail how far the correlation is correct. The conclusion is that: "an unquestioning faith in the economic benefits of education has brought with it huge amounts of wasteful government spending, attached to misguided and even pernicious policies".[183] While noting that rich and developed countries have high levels of education, Wolf points out the weakness of the evidence supporting the view that countries which spend a lot on education are wealthier or that a higher skilled workforce makes the country richer.[184] The current government's approach of "pumping more money into education" is "snake oil" which does not at all "guarantee even half a per cent a year's extra growth".[185]

Wolf's critique concerns education in general but applies also to the critiques on skilling, i.e. lifelong learning. "A simplified version of human capital theory"[186] is criticised by, for example, Ashton and Green, and Mills.[187] The government's rigorous approach to skilling for economic competitiveness has "severe limitations".[188] This is because, first, the link between skills and economic performance has to be seen in its social context. The strength of the link and the nature of skills are influenced by potential political conflicts, both nationally and internationally. Second, the link between education, training and the economy is not based on "hard" empirical evidence. It is in "the realm of theoretical belief or just plain hope". Third, the notion of "a globally integrated economy" is doubtful since there is substantial diversity. Skills trends across different parts of the globe, which have not been researched, are likely to be diversified.[189] The government's correlation between education and training, and economic performance and competitiveness has not been successful in convincing these academics.

However, Halliday presents a counter-argument. His claim is that research evidence

shows that in Britain, there are between two and five million adults who are not fully literate but performing a variety of jobs perfectly adequately.[190] Also, an issue of "over-qualification" is raised: a number of people in the workforce are over-qualified for the jobs they have.[191] Moreover, the lack of basic literacy and numeracy skills does not raise a high level of concern amongst employers.[192] To sum up these critiques, Halliday's argument is borrowed:

> It is simply wrong to claim a universal link between economic performance and lifelong learning conceived as an ongoing form of skill acquisition. The formation of policy on lifelong learning must turn away from such a putative link.[193]

The argument that "more skills" will create a "high value-added economy" and "economic success" has been poorly researched.[194] There is a need for further inquiry.

One way of understanding the importance of the link between skills and the economy is to question why economic development has been such a priority in England. One motivation might be that a strong economy is so important because of the fear of the repetition of the last recession. Neither the government nor the public want to experience a recession again and to downscale. The current Labour government has derived political benefits from Gordon Brown's cautious economic policies[195] including the strict auditing and the accountability of public spending. Skill-based education policies meet this criterion since they are measurable through qualifications.

Throughout the years of the emergence of lifelong learning policy since the end of the 1980s, lifelong learning was an alternative term for upskilling, reskilling and retraining. Lifelong learning policy has directly connected as a solution to skills deficit and, ultimately, to the economic growth of the country. This aspect of lifelong learning has remained unchanged. At the same time, the need for the auditing of lifelong learning policy has

developed. For these reasons, the government has been keen on setting targets and developing a qualification framework. English society as 'an audit society' is a relatively new perception, but there is another feature of English society that is a long-standing one: it is a class society.

5) Social Class

Class issues have been discussed in England in relation to many issues, including education. The common perception throughout English society is that learning has always been reserved for the elite, that the country has been good at educating the top cohort of the population but bad at educating the majority, that an education divide, based on social class and parental background, is the strongest determinant of educational attainment[196] and that the working classes have been inferior, less cultured, less clever than the middle classes.[197] As a consequence of the elitist system which operated until the 1980s, learning has been for a part of the population only, and the country has had the lowest intermediate skills in the developed world. As Humphries puts it: "That is our problem and failure."[198]

'The learning divide' – although not the phrase – had existed in England long before the emergence of the term in the mid 1990s. However, Fryer indicates that despite the repeated indication of the class factor in for example, university entrance, distribution of learning at work, and opportunities of learning, the government has been reluctant to adopt class analyses.[199] Indeed, in education, class is a key factor since it is not only "the site of manifestation of class difference", but also "a reproducer" of the difference. Some of the recent initiatives deserve applause, but, Fryer goes on to argue, they are limited and incoherent, not challenging some of the traditional notions of learning and class. "Until we face it, we are not going to get lifelong learning inclusive of everyone".[200]

The current Labour policies target the marginalised population since it is these people who cannot learn without support. The policies look at how they can be persuaded to start learning and what mechanisms can be used to reengage them in learning without threatening them. One route starts with informal learning to maximise the chances of a successful initial experience. Once they are back in learning, they will be more likely to carry on.[201] If the seven million people who have problems with literacy and numeracy are able to achieve the basic Level 2, they will then go on to the further learning which leads to employability.[202] Labour's approach has been to prioritise the marginalised population and at the same time, it has treated learning as 'a passport out of poverty' to support such people.

There are, however, a number of criticisms of the Third Way approach to class issues. The first is against the targeting of 'who is not learning', i.e. the working class. There is a view that New Labour's lifelong learning policy has an aspect of compulsion.[203] The policy is to "coach"[204] those who is not engaged in learning to draw them back into the labour market. In school education, a compulsion element targeted at working-class parents is identified by Gewirtz. It is argued that the government is trying to change working-class parents' attitudes to promote "a culture of achievement"; the aim is to "eradicate class differences by reconstructing and transforming working-class parents into middle-class ones".[205] The government has simplified the policies for widening participation of the working-class by setting out to "universalise the values and modes of engagement" of middle-class.[206] A question mark remains as to whether lifelong learning as a remedy for under-represented groups, in compelling them to engage in learning, is an appropriate application of the policy. Edwards *et al* go further, indicating the incorrect principles in the government's approach to the class agenda: "the fundamental problem is

poverty, not education".[207] "The fixation" of the government's social exclusion policy – social inclusion through economic inclusion through lifelong (l)earning[208] – will not be able to break the "cycle of exclusion".[209] The simplified logic is not necessarily tackling the crisis of the learning divide.

The second group of criticisms suggest that there is an irony in the Third Way approach in that it actually creates: more stratification. Ainley argues that as a consequence of "the new market modernisation",[210] the gap between the rich and the poor has been widened, the fragmentation between individuals and groups has been aggravated and state services – education, health or housing – which were previously available to all citizens have shifted to a "two-tier" system – one for the rich and the other for the poor.[211] A meritocratic system of wide and open opportunities can indeed enhance the learning divide because as Evans argues: "the qualifications chase eventually becomes a zero-sum game for all but the most advantaged, those who can stay in the race longest".[212] Also, the notion of 'choice' and 'diversity' is disputed. As indicated earlier, Whitty argues that: "education reforms couched in the rhetoric of choice, difference and diversity often turn out to be sophisticated ways of reproducing existing hierarchies of class and race".[213]

Edwards *et al* note the government's contradictory position on the concept of social inclusion and exclusion. If cohesion requires "homogeneity of cultures, values and beliefs", then diversity and cohesion could be a problem. This is to question the "social order".[214] They go on to argue that the "elimination of social exclusion as a practical activity is unachievable", pointing out that "non-exclusion is not the same as inclusion, and that we must avoid taking away the freedom of those who choose not to be included, and that we must accept 'Otherness'".[215] Moreover, Whitty points out that social

exclusion is "a dual process"; that is, exclusion occurs not only within the working class, but also in the middle class since certain members "self-exclude" themselves from the mainstream education system.[216] The ultimate criticism comes from Reay. It is the policy-makers themselves, who are elites, that lack care and refuse to look into class issues in wider social contexts.[217]

What all these critiques allude to is the rigidity of social class in English society. Class continues to be an obstacle in realising a learning society even within the Third Way. The issue of class is deeply embedded in English society, people have class identities to which they belong.[218] Without thoroughly confronting the issue, the biased learning participation and the culture of refusal of learning amongst the working-class population will not disappear. The positive measures undertaken by the government in increasing the number of active learners are not necessarily addressing the root of the problem. There is a danger of only superficial progress and a failure to achieve lasting change.

That England is a class society is the source of further problems within the education system. First, the division at the age of 16 between academic and vocational tracks tends to attach 'success' and 'failure' labels to young people. Those who choose the vocational route tend to see 'learning' as not for them, and this view is shared by the wider society. The division has repeatedly been addressed and the former Secretary of State for Education and Employment, Blunkett, has commented that the country had had "to contend with an elitist academic culture which has failed to value technical study and attainment",[219] whilst more recently Blunkett's successor, Morris declared that the country "should no longer tolerate a culture that devalues vocational learning . . . I want to see a vocational renaissance that captures the imagination of young people and challenges prejudice".[220] However, it is difficult to alter deep-seated perceptions within

society, and people who follow a non-academic route are likely to stay away from learning activities.

The government has acknowledged the harmful effects of the division. Admitting "England's post-war legacy" of undervaluing vocational education and qualifications and the limited success of the reforms undertaken during the last sixty years, Morris emphasises in the recent Green Paper *14-19: Extending Opportunities, Raising Standards*, a determination "to break down the divide between education and training" and to make sure that "all pathways contribute to employability and responsible citizenship".[221] Such statements have been heard many times. So far, however, the gap has not been successfully bridged, although there have been initiatives to this end.

To "extend vocational opportunities" and "to ensure comparability" between vocational and academic qualifications and "to simplify the current complex structure and create a coherent programme of vocational learning",[222] the government has adopted certain strategies. For example, Foundation Degree and Work-based Learning are made accessible to Modern Apprenticeships;[223] Vocational A levels have replaced Advanced GNVQs; and Vocational GCSEs are replacing Foundation, Intermediate and Part One GNVQs.[224] Despite the government's packaging which includes vocational initiatives such as Work-based Learning for able pupils, these are rarely taken up since these are seen as initiatives for the less able.[225] The hidden message of the qualification division is, according to Hodgson: "If you are a marginal person, let's not waste time and go straight to the labour market."[226] As long as the age of division is 16, a fundamental change to the system is probably unrealistic. The separation will remain. Ashton and Lowe also indicate that "the British working class" are unlikely to be motivated for academic achievement, and therefore, they are not necessarily keen on continuing in full-time

education beyond the age of 16.[227]

In an education system which separates academic and vocational tracks and where these are labelled as 'success' and 'failure', the alteration of the vocational track's self-portrait as 'failure' cannot be achieved simply by "extending opportunities" and "raising standards" of the vocational track. The source of the division does not lie in the post-16 sector or even in the post-14 sector (which has recently been recognised as more appropriate than post-16 to facilitate a smooth transition to further education and to minimise dropouts at the age of 16). The division actually starts a lot earlier than 16. There is also an indication that children who go to a secondary school, not a Grammar School, are seen as "failures". When they reach the age of 16, they simply want to leave school since 16 is the end of "learning".[228] There is a view that the division starts from the age of six or seven, or even five or six.[229] Thus the academic and vocational tracks which carry with them an implication of success and failure need to be discussed within the context of the structure of the whole learning system.

Nevertheless, such a strategy has seldom been developed. As Coffield points out, the government has located lifelong learning as an important but selective deficiency policy for post-16 education and training.[230] It should be clarified here, however, that the significance of the early years of initial formal education is recognised to some extent. For example, a recent document on objectives and priorities indicates that one of the objectives for 2006 is to: "Give children an excellent start in education so that they have a better foundation for future learning."[231] But what is lacking is the notion that the early stage of learning is a part of a lifelong learning system. So-called 'lifelong learning policy' does not address nursery and primary education, although the situation in secondary education policy seems to be changing. The approach of 'post-14' has emerged, and the

connection of secondary education and the post-compulsory stage is therefore being developed. The concern of a transition from school to work has been one of the major educational agendas, and the Green Paper, *14-19: Extending Opportunities, Raising Standards* was published in 2002.[232] Still, however, secondary education is treated separately from lifelong learning, i.e. the post-compulsory sector. If lifelong learning aims to develop 'learning cultures' in England, a lifelong learning policy framework should incorporate all stages of learning, particularly the initial stage of formal education since that is where the culture of 'the resistance of learning' begins.

The Labour government defines lifelong learning as an overarching policy, but as we can see there is a lack of co-ordinated thinking between the compulsory and the post-compulsory sectors.[233] In fact, a DfES official, Edmeades indicates that the Strategy and Funding Unit to which he belongs does not really co-ordinate its work with other Directorates except the Youth Directorate.[234] This is not to say that nothing has been done at the school level. Compulsory education reform was undertaken after Morris became the Secretary of State. In the years 2001 and 2002, she concentrated on primary education reform. Publishing *Schools: Achieving Success* and *14-19: Extending Opportunities, Raising Standards*, [235] she emphasised that: "Bringing about a step-change in performance at secondary level is the top priority for us in the next five years."[236] Nevertheless, the proposed policies are more to do with "keeping young people in education and training at 16" either in academic courses which lead to higher education or vocational training and in turn to jobs.[237] The major concern of the Green Paper is how to maximise the number of young people who finished compulsory education and then continue in full-time education or training. The school reform policies do not discuss a lifelong learning perspective despite the government's claim to be emphasising learning 'from cradle to grave'.

Although capable of encompassing all learning, lifelong learning addresses, in practice, post-compulsory learning in England. Hence, policies which address the compulsory stage are excluded from lifelong learning policy. The weakness, which the government has been aware of since the 1970s, has been the lack of basic and intermediate skills amongst young people and adults. As has been identified above, the strategies of the government have been to reform the post-16 sector, the qualification system and the provision of vocational training under the name of 'lifelong learning'. School education has been considered unrelated to the deficit, and has been treated as if it is outside the policy.

Nevertheless, children start developing their identities at school. The impetus of a learning divide may emerge at school age. Rees *et al* criticise the government's approach which underplays the importance of initial school. Researching social inclusion policies, they argue that the policies will have a limited effect: the findings show that "learner identities" are formed at the early stages of life through family influences and school experiences. Therefore offering more learning opportunities and removing obstacles, e.g. by providing a childcare facility, does not necessarily bring non-participants back to learning. It was also claimed that to combat social exclusion, a 'from cradle to grave' approach which would enable identities as a lifelong learner to be promoted, should be considered.[238]

The current Labour government is concerned about and addresses the issues of social exclusion and the learning divide, and in doing so has received approval from academics and practitioners. However, the pitfall is their neglect of the broader perspective of the problem particularly in relation to school education. No matter how many supportive

programmes and how much counselling is offered to under-represented groups over 16 years old, the fact remains that they have already by that age developed their basic values and self-image, which may indeed, be rigid. New Labour has been the first administration to carry out a systematisation of lifelong learning policy with large-scale partnerships and measurable outcomes. Its emphases encompass both economic competitiveness and social cohesion. In that respect, Labour and the previous Conservative administrations differ. Despite this 'dual commitment', however, the Labour government's development of lifelong learning policy has underestimated the influence of social class on people's learning cultures. As Fryer puts it: "The real barrier is class."[239] Unless it is tackled from the early stage in the education system, the idea of 'learning cultures' will remain rhetoric.

The answer to the first research question of this chapter, therefore, is that the watershed of the development of lifelong learning policy was when New Labour came to power and recognised the seriousness of the learning divide. After 1997, New Labour redirected the policy focus of lifelong learning, treating social inclusion as central to their social reform. The second question was how has lifelong learning policy changed? First, lifelong learning was a component of New Labour's Third Way in which inclusion was pivotal, second, the then Secretary of State's believed in lifelong learning and third, compared with the Conservative era, the years around 1997 were marked by a better economic situation. Change in lifelong learning policy also occurred in terms of the two characteristics of English society: the emphasis on an audit culture and a new alertness to social class rigidness. These have also affected the major concerns of the current lifelong learning policy: i.e. 'skills' for the sake of economic growth in England.

The next section aims to respond to the question: *What was the strategy for the*

implementation of the changed lifelong learning policies? The Labour government undertook a particular strategy in implementing a redirected lifelong learning policy.

4. Implementation Strategy

This section suggests that the Labour government's chosen strategy to implement their lifelong learning policy, which stresses social agendas more than the previous administration, is the targeting of "non-learners".[a]

In 1998, shortly after it came to Office, the Labour government set up the NSTF, an advisory body to the Secretary of State for Education and Employment.[240] The Task Force was a means of finding out how to allocate public resources. The aim of the NSTF was set: "to assist in developing a National Skills Agenda,[b] to help ensure that Britain has the skills needed to sustain high levels of employment, compete in the global market and provide opportunities for all".[241] The expert members of the NSTF ranged from the Director-General of the British Chambers of Commerce as the chairman, the former Chief Executive of the TEC, trades unionists, employees and managers from different sized firms to practitioners from further and higher education. During its two years of work, the NSTF published three Reports, which became a basis for New Labour's skill development. The Reports contributed to the analysis of a long-lasting 'skills shortage'. They identified "which sorts of skills were in short supply", made concrete recommendations to employers, providers and individuals and made proposals for management of the education and training system.[242] The NSTF was a large-scale and

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[a] 'Non-learners' are those who have not done any learning in the past three years (DfES, 1998, http://www.lifelonglearning.co.uk/greenpaper/ch8006.htm).

[b] The specific role of Skills Agenda is "to advise on skills gaps and shortages, current and anticipated, in the labour force and how they can be addressed (DfEE, 1999, http://www.lifelonglearning.co.uk/iln9000/iln9018.htm)."

focused advisory group, and its formation as well as its outcomes were effective as a process for supporting the government's strategy of skills development.

There has been another new notion that New Labour has adopted for the purpose of targeting: that of partnerships.[a] These have been rigorously developed. Firstly, the government has established many quangos. Although this tendency was seen in the previous Conservative administration, e.g. TECs, FEFC, HEFCE, Labour's approach was to accelerate this process and at the same time reach down to local levels. One example is the Learning and Skills Council (LSC),[b] an executive non-departmental public body, which was established to integrate the fragmented post-16 sector. Being responsible for "strategic development, planning, funding, management and quality assurance" of the post-16 sector,[243] the LSC functions together with 47 local LSCs to undertake planning and co-ordination of provision locally.[244] The LSC has a mission "to raise participation and attainment through high-quality education and training" so that "by 2010, young people and adults in England will have knowledge and productive skills matching the best in the world".[245]

The government expects the LSC to facilitate a "sustainable level of employment through the updating of skills and the embracing of new technology" and "to reach out and draw

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[a] The government uses the term, 'partnerships', with a general meaning, which should be differentiated from 'social partnerships'. Green explains the approach based on 'social partnerships' in the practice of lifelong learning: "The state plays a key role in setting a frameworks for the rights and responsibilities of the different partners, but works with the partners at different levels in concerting action. Planning and coordination are not from the top but through the concerted action of the different interest group bodies at national, regional, local and workplace levels. Coherence, consistency and transparency in provision and qualifications remain primary goals but these are sought through negotiating procedures that ensure maximal flows of information and equitable representation of legitimate interest groups (in ed. Hodgson, 2000, pp.39-40)."

[b] The LSC took on the training functions of the Training and Enterprise Councils (TECs) and the funding responsibilities of the Further Education Funding Council (FEFC).

into learning those who were previously economically inactive or have been victims of industrial and economic change".[246] Young people, in particular, are encouraged "to stay on in learning until age 19 and to achieve at least a level 2 qualification"; and adults are expected to "continue to develop their competence for the labour market", non-learners should be drawn into learning and adults without basic skills should be helped so that they can be effective in today's economy and society.[247] Also the concrete targets which focus on raising participation and achievement by young people and adults are defined.[248] The infrastructure of the national LSC and 47 local LSCs is aimed at implementing an effective and efficient strategy to maximise the number of learners and to minimise the learning divide.

At the regional level, there used to be nine Regional Development Agencies (RDAs) operating to achieve regionally balanced economic growth.[249] Now in addition, the Sector Skills Development Agency (SSDA), an employer-led non-departmental public body was founded to involve businesses more in the decision-making of skills, business development and productivity performance. The SSDA has a subordinate network of Sector Skills Councils (SSCs)[a].[250]

Quite a few schemes have been developed to enhance partnerships. Learning Partnerships is one of the largest scale initiatives, aiming to provide local LSCs with an understanding of local labour market needs and to bring coherence and co-ordination to post-16 learning.[251] A network of 101 partners is in place: they are non-statutory and voluntary groups of the representatives from local education authorities, careers services, the Sector Skills Councils, further education and sixth form colleges, higher education

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[a] SSCs were superseded by National Training Organisations in March 2002.

institutions, community groups and employers.[252] Another major initiative based on partnerships is Adult and Community Learning Fund, which is managed jointly by the NIACE and the Basic Skills Agency to support community-based adult learning projects.[253]

These are examples of the development of partnerships outside the government. At the same time, within the government, partnerships have been one of the central strategies of New Labour's overall politics. The strategy is termed, as earlier chapters indicated, "a cross-cutting approach", which emphasises "joined-up thinking".[254] 'A cross-cutting approach' is defined as: "any policy or service where there is or should be joint working between Government departments and agencies".[255] Aiming to strengthen the capacity of Whitehall and swift delivery, units which function across the Departments and report directly to Prime Minister have been established within the Cabinet Office.[256] The DfES has a strong link with the Social Exclusion Unit,[a] the Delivery Unit and the Strategy Unit.[257] The Treasury plays a large part in this joined-up thinking through Spending Reviews, which are made in terms of Public Service Agreements (PSAs).[258]

Partnerships are developing, aimed at supporting widening participation in learning, to increase attainment, to improve standards, to meet the skills challenge and to contribute to social inclusion and regeneration agendas. The government's strategy is to share the responsibilities, involving as many members as possible from the whole of society. The

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[a] One example is that the Social Exclusion Unit created *National Strategy for Neighbourhood Renewal: The Action Plan* in which delivering "real change" towards "revived economies, safer communities and high quality public services" was assured (The Social Exclusion Unit, 2001, http://www.socialexclusionunit.gov.uk/publications/reports/pdfs/action_plan.pdf). The Action Plan has been implemented by the Neighbourhood Renewal Unit, which is a part of the Office of the Deputy Prime Minister (The Neighbourhood Renewal Unit, 2001, http://www.neighbourhood.gov.uk/aboutus.asp?pageid=1).

government sees its own role as to "help people invest in learning by lifting barriers to access and improving the quality of support available to businesses and individuals",[259] but at the same time, the government argues that employers, providers, practitioners and individuals all share responsibilities in the skills challenge and social cohesion, i.e. lifelong learning. Partnerships, which include structural collaboration based on quangos and a cross-cutting strategy for policy-making, are the current Labour government's important means of pinpointing who is not learning.

The government's action as an implementation strategy also includes the enactment of the Learning and Skills Act in 2000 in which the Learning and Skills Council (LSC) was established. The aim of the establishment of the LSC in the Act was "to secure provision of education and training for young people and adults and to encourage employers and individuals to participate".[260] The Learning and Skills Council was made responsible for the provision and funding of post-16 education and training. However, from the phrasing of the Act, the focus of the government is young people between age 16 and 19: the LSC "must . . . encourage individuals to undergo post-16 education and training, . . . encourage employers to participate in the provision of post-16 education and training" and "encourage employers to contribute to the costs of post-16 education and training".[261] Individuals' and employers' responsibilities were defined.

In 2001, the LSC came to function as an integrated organiser and funding body, incorporating TECs and the FEFC. The post-16 sector had been criticised for its fragmented system, and the LSC was to reform it into a unified system. The government considered that the structure of the LSC and local LSCs was an effective and efficient way to undertake skills development for those who need it most, involving partners nationally and locally. The position was marked by a law.

There was also a government's commitment to persuade everybody to learn, explaining learning potential, which was carried out through the publication of policy documents. Particularly in the early years in the government, this persuasion message was strong: i.e. learning benefits everyone, therefore everyone should learn. The message can be identified particularly in *The Learning Age* and *Learning to Succeed*. The emphasis of *The Learning Age* is that lifelong learning is beneficial in both economic and social respects, and at national and individual levels. For the national economy, "learning is the key to prosperity",[262] and "learning develops the intellectual capital which is now at the centre of a nation's competitive strength."[263] For communities, "learning contributes to social cohesion and fosters a sense of belongings, responsibility and identity".[264] For individuals, "learning offers excitement and the opportunity for discovery. It . . . nourishes our souls. . . . Learning increases our earning power".[265] "Love of learning" and "learning for its own sake" contribute to making a civilised society.[266]

In the creation of 'a learning society' where learning opportunities should be many and many people should be committed to learning, therefore, everybody has to be involved. The principles of the building of such a society should be "investing in learning to benefit everyone", but at the same time making sure of "achieving world class standards and value for money". "Putting people first" and "lifting barriers to learning" are also fundamental in realising inclusion and cohesion, and approaches should be "working together" and "sharing responsibility" partnerships.[267] At the same time, *The Learning Age* argues: "We cannot force anyone to learn – individuals must take that responsibility themselves."[268] An implication is everybody should take up a learning opportunity as 'learning' does a lot of good.

Learning to Succeed, a White Paper on post-16 education, training and learning, has a stronger emphasis on economic agendas of employability, competitiveness and the level of qualifications. The weakness, skills shortage, is reemphasised: "There are too many people with few, if any, qualifications and too many with low skills."[269] The importance of qualifications is stressed: "Those without qualifications earn 30% less than average earnings"; "The earnings of people with degrees are double those of people with no qualifications"; "The unemployment rate of those with no qualifications is more than three times that of graduates".[270] Emphasising that qualifications and skills are important to employability, the White Paper encourages young people to stay in education or training, and encourages adults to go back to learning.

'Success' is about a high-skilled workforce which enables higher economic performance than international competitors. To succeed, therefore, skills development targeting the weak points is necessary. *Learning to Succeed* justified this targeted strategy, i.e. post-16 skilling.

5. Summary

To summarise this chapter on England, three research questions that the above sections have dealt with, are reviewed:

When and what was the watershed in the development of lifelong learning policies in England?

How did lifelong learning policies change?

What was the strategy for the implementation of the changed policies?

The watershed was when New Labour came to office in 1997. After the formulation of lifelong learning policy in 1995, despite the implementation of a number of initiatives, convincing evidence showed a worsening skills shortage. The increase in skill gaps was

identified, and that was when the Labour government realised that a new approach was required to tackle the problem. Unlike the previous Conservative government, Labour had social agendas as well as economic ones.

First, one of the Third Way's principles, social inclusion, was treated as an important element of lifelong learning. The (then) Secretary of State, Blunkett played a major role, advocating humanistic aspects of lifelong learning. Also, the economy was recovering after the long recession which the previous Conservative administrations had to suffer. These are positive factors which contributed to the reemphasis of lifelong learning and its new dimension of social concerns.

It has also been argued that there have been certain features of English society that have prevented the pursuit of inclusion and cohesion: 'an audit society' and a class society. The establishment of the notion of 'accountable audits' combined with a powerful Treasury did not allow education and learning policy to be separated from the economy. Moreover, earlier social inclusion policies had not really been addressing the rigidity of class in English society.

The reshaping of lifelong learning policy needed a new strategy. After targeting 'who is not learning', strategic planning and implementation were carried out. First, to identify 'non-learners', the Task Force on skills development was set up. The democratic principles in the work of the Task Force also had the advantage of justifying its proposals. Also, through partnerships and networks at the national and local levels and a cross-cutting government structure, the identification of 'non-learners' and disadvantaged populations was enabled. Second, a system for post-compulsory education and training was supported by legalisation. The Act authorised the LSC to target those who need

learning most. Third, in the two fundamental policy documents on the principles of lifelong learning, *The Learning Age* and *Learning to Succeed*, the benefits of learning were outlined to put the case for those who are disengaged from learning.

A specific implementation strategy has been undertaken, once again, but – compared with the efforts of previous Conservative governments during the years of the emergence of lifelong learning policy – the strategy this time was larger in its scale, aiming at overall structural change for education, training and learning. The previous principle of participation was the involvement of the private sector; whereas this government was setting up an infrastructure involving all possible actors – the central and local governments, employers of different firm sizes, various educational institutions and/or voluntary sectors. In this, the Labour government's seriousness and speed in tackling the skills crisis was evident.

New Labour's 'dual commitment' to social agendas as well as economic objectives is not rhetorical, but at the same time, social cohesion, inclusion and regeneration are an economic agenda.

Similarly in Japan, after the formulation of lifelong learning policy as a remediation strategy, it was reshaped in terms of the critical circumstances of the country. In Japan also, a watershed led to the reformulation of policy, but in Japan's case, the watershed was more complex.

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CHAPTER SIX WATERSHED AND REFORMULATION: JAPAN

1. Introduction

In Japan, there was a deep-rooted historical problem, *gakureki shakai* [a credential society] to which lifelong learning was seen as a solution, and this linkage was the origin of its development. Nakasone's *Rinkyoushin* focused on shifting a credential society to a lifelong learning society. The building of a lifelong learning system infrastructure followed *Rinkyoushin*, and initiatives to promote lifelong learning were implemented. Nevertheless, the problems in Japanese education were far from solved, and indeed more developed.

Fully to understand what happened to lifelong learning policy when Japan encountered these problems, this chapter asks:

When and what was the watershed in the development of lifelong learning policies in Japan?

How did lifelong learning policies change?

What was the strategy for the implementation of the changed policies?

This chapter suggests that the watershed in Japan was earlier than in England, and occurred in the first half of the 1990s when the country experienced continuous and serious problems. However, the after-effects of the watershed continued throughout the rest of the 1990s. This study attributes to these problems in the 1990s, the term '*shakai kouhai* [the desolation of society]', that is, a society with confusion, anxiety and uncertainty as a result of a lack of future direction.

The reformulation of lifelong learning policy was undertaken as part of the countermeasures to *shakai kouhai*. There were also certain socio-cultural elements that

contributed to change of the policy.

During the processes of reformulation, drastic policy strategies to restructure society were introduced. The Japanese government came to stress 'community building' in implementing the reshaped lifelong learning policy.

This next section examines the watershed which brought change to lifelong learning policy in Japan. The third section is the analysis of the reformulation processes of the policy. The final section summarises the chapter.

Firstly, the trigger of the reformulation of Japan's lifelong learning policy is analysed.

2. Watershed: *Shakai Kouhai* [The Desolation of Society]

1) *Kyouiku Kouhai* [The Desolation of Education]

At the end of the 1980s, *Rinkyoushin* had already identified *kyouiku kouhai* [the desolation of education], which means: a sense of crisis within education, which can be identified by a rise in the incidence of serious bullying and suicides, an increase in upper secondary school dropouts, pupils' mental and physical problems, apathy and a lack of spirit and self-control. 'The desolation of education' was seen to have derived from the inflexible school system, the intensifying competition of entrance examinations, the increased demand for higher education, rapid societal changes and the over-protection or non-interference of parents, teachers and other adults.[1]

Kyouiku kouhai, as this section indicates, continued to develop in the 1990s. In addition to juvenile delinquency, bullying and absenteeism, schools were not functioning properly: many teachers could not run a lesson in the classroom because of problematic or

indifferent pupils. The phenomenon was termed "class disruption [*gakkyuu houkai*]",[a] which according to Ogi, first appeared in 1994, and the media began using it.[2] Schools were said to have lost their function as a teaching and learning institution. The dignity and authority of, and trust towards, the school were undermined. Pupils and parents were losing their respect for the institution, and the teachers' confidence levels fell.

The irony was, however, that Japan had had confidence and a pride in the 'success' of its modernisation which had been based on education. On one occasion in the 1960s, the Ministry of Education stated: "we may say that education preceded industrialization."[3] Such a perspective had been reinforced by external appraisal. Cummings points out that: "Japan . . . was one of the first societies to treat education as a tool for national development." That was possible because "diverse interests in Japan are concerned with education": i.e. "the central governmental and business elites look upon education as a means for training a skilled labor force and highly qualified manpower, for identifying prospective elites, and for teaching a common culture."[4] Also, teachers' contributions were identified. Believing in "whole person" education, teachers – "a respected profession" in Japan – have seen fostering "well-rounded people", "not just intellects", as the most important task.[5] The values, aptitudes and norms developed during schooling were an advantage to businesses and industries when people enter working life. Wray summarises the contribution of Japanese education to the country's prosperity: "higher societal expectations and greater societal support of schools"; "stronger emphasis on character formation"; and "an understanding that cultivating good attitudes is a prerequisite for a vigorous economy and an orderly society".[6] These analyses indicate

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[a] Ogi's definition of 'classroom disruption' is: a phenomenon at a primary school that a lesson of the whole classroom cannot be formed due to the pupils' walking around, chatting or behaving selfishly during the lesson hour (2000, p.11; p.28; p.30).

that nationally and internationally, it has been considered that Japanese education played an important role in the development of the country.

Dore and Sako argue that the efficiency of Japanese enterprises stems from their nature as "learning organisms" which is about "the patterns of co-operative effort, constant consultation, group responsibility and group sharing in achievement". Such features are fostered during school days through, for example, group activities.[7] Learning organisms are, according to Dore, a historical legacy of Japan. With a high literacy rate as early as in 1870, the country had already "got over the first hurdle in a process of purposeful development, the diffusion of a simple notion of the possibility of 'improvement'". Once people were literate, they became keen on "self-improvement", which "meant moving out of one's hereditary position". "Getting a reading and writing job" enabled "national improvement, bettering oneself, mobility aspiration, social ascent"; in other words, "learning was the royal road not only to the professions and to government, but also to business success".[8] These established educational values formed the foundation of Japanese society.

However, despite both the internal and the external appraisal of the Japanese 'success' of modernisation based on education, the country had to face problems related to education, and during the first half of the 1990s, circumstances deteriorated. Despite the historical confidence in, and the achievements of education, Japan has, as a result, experienced doubt about the national education system for the first time. Kudomi's prediction became a reality: "Competitive Japanese education[a] will face catastrophe in

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[a] Kudomi identifies four particular features of 'competitive Japanese education': intensity; '*juku* [crammer school]' being a part of children's everyday life; involvement of almost all social classes; and competition and ranking amongst schools.

the not too distant future."[9]

Kyouiku kouhai devastated both the Japanese government and the public, but there were other components which led Japanese society into *shakai kouhai* [the desolation of society]: the collapse of the Bubble Economy, political instability and the Hanshin/Awaji Region Earthquake. These events together led to the watershed of lifelong learning policy.

2) The Collapse of the Bubble Economy

The collapse of the Bubble Economy of 1991 was an economic disaster.[10] It transformed the country's economic situation into the worst since the end of World War Two.[a] It is suggested here that this disaster was not limited to economic downfall, but also involved a powerful mental shock experienced by the government and the public; this was a crisis which beset the whole society. The difficult economic situation that Japan then experienced and is still experiencing was the worst in 50 years.

Until the collapse of the Bubble Economy, particularly in the 1970s and the 1980s, Japan was confident about its self-identity as a powerful nation in the world. After World War Two, the country kept trying to 'overtake the West' and indeed, it obtained the status of an economic world power. Japan was treated as a 'successful' country which had achieved

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[a] The Bubble burst "when the Finance Ministry, seeking to protect overextended banks from the effects of unwise lending, took steps to start deflating asset prices. The result was a drop in the prices of land and shares, sluggish consumption, falling company profits. The annual rise in GNP for the fiscal year 1992 was the smallest since 1974 (the first 'oil shock' crisis). In the spring of 1992 the Nikkei index of the Tokyo stock exchange went below 20,000 for the first time in five years. In August it was below 15,000, well under half its previous peak. Automobile sales fell in each of the three years 1991, 1992 and 1993. . . . One consequence was the consumers turned more and more to lower-cost goods, which were now becoming much more readily available in discount shops" (Beasley, 1995, p.285).

economic prosperity in a short period after the defeat of the War. Vogel, for example, phrased it as: "Japan as Number One".[11] Its 'success' and 'uniqueness' were analysed. Vogel considered that Japanese 'successes' could be identified in its style of decision-making:

> The decision comes not so much from arguing, persuading, and contending but from joint efforts to arrive at the best solutions . . . In decision making the Japanese endeavor to concentrate on the overall goals of the organization, minimize polarization, and find the one solution most likely to succeed.[12]

A UNESCO study indicated that Japanese uniqueness lay in "the strength of their traditions" and "their receptiveness to the influences of foreign achievements and their selective adoption of the best foreign inventions".[13] Such a reputation, however, faded when the Bubble Economy collapsed in 1991.

Since then, the prolonged economic recession has brought accumulated national debt, the collapse of large banks and a high unemployment rate. According to the Ministry of Health Labour and Welfare, the unemployment rate continued to rise throughout the 1990s and, particularly in the second half of the decade, the rate became the highest that the county had ever experienced.[14] Criticism, particularly from industries, was rising and this led to a need for more fundamental restructuring to revitalise the domestic economy.[15] In the 1999 White Paper, the Ministry of Labour stated: "The Japanese economy is now experiencing its most severe condition since the first oil crisis, and the labour market is undergoing significant changes. Against this backdrop, the keys to ensuring employment stability are balance and diversity."[16] Customs such as the seniority wage system, lifetime employment or the utility of high academic qualifications have begun to be questioned. Japan has had to decide to redirect, reorganise and rebuild its economy as well as its society. The seriousness brought about by the sudden

change in the economy has been influential at different levels.

After the 'Bubble' burst, the country experienced some difficult moments. A national debt and unemployment rate that the country had not experienced since World War Two created a perception in the government and the people that the country was in a state of emergency. Issues in which the country had been confident and certain – such as lifetime employment and the seniority wage system – were questioned. A fundamental adjustment was required to industrial structures and industrial relations, and people's way of life planning had to be revised. The need to be adaptable to the unpredictable in society, led to education, training and learning being reemphasised.

The government and the people were aware of the urgent need for change; but how to change and in which direction was not clear. Like the domestic economy, the political situation was unstable too.

3) Political Turmoil

The period of the unstable political situation between the end of the 1980s and the mid 1990s overlapped with that of the development of educational crisis and of economic instability. As this section suggests, contributing to the rise of uncertainty, and therefore, to the development of *shakai kouhai* [the desolation of society], political turmoil was one of the elements which led to the reshaping of lifelong learning policy. Hence, political instability is significant in analysing what triggered the reshaping and when it occurred in Japan.

Nearly every year between Nakasone's resignation in 1987 and 1993, there was a new Prime Minister from the leading Liberal Democratic Party (LDP). In 1993, a new non-LDP

party won the election, seceding from the LDP in reaction to the corruption within the Party. This had not happened since the American Occupation. The political instability continued. The new non-LDP Prime Minister soon had to resign because of a political scandal, and a year later, the Socialist Party came to power for the first time. In 1996, the LDP returned to power with Prime Minister Hashimoto. In total, there were seven Prime Ministers between Nakasone and Hashimoto, and with each change, the cabinet was reshuffled.[17]

Such turmoil in the polity itself raised scepticism and anxiety amongst the public. During these years, the polity was not functioning as it should have been, and therefore, the policy-making process slowed down. On top of this, there was a totally unexpected occurrence which brought devastation to the country: an earthquake.

4) The Hanshin/Awaji Earthquake

The earthquake that occurred in the Hanshin/Awaji region in January 1995 brought a state of emergency to the whole country and had a significant role in the reshaping of lifelong learning policy. Nobody could have predicted such large-scale damage to the region and its people – 6300 fatalities and 200,000 collapsed residences.[18] On top of the shock of the tremendous natural damage itself, the people's trust in environmental safety collapsed, and poor risk management and inefficient and ineffective decision-making at both national and local governmental levels were exposed. After the earthquake the region was in a state of catastrophe, and society as a whole feared that such a large-scale earthquake could strike again, anywhere in Japan.

When and what was the watershed in the development of lifelong learning policies?

The answer in Japan's case is more complicated than that in England's case. The

watershed was the first half of the 1990s. *Kyouiku kouhai* [the desolation of education] stemming from *gakureki shakai* [a credential society] was already more than an educational crisis; but on top of that, economic collapse, political turmoil and a natural disaster deepened the crisis. *Shakai kouhai* [the desolation of society] was not only about material damage, but also about the psychological depression of Japan. Both the government and the public lost confidence and clear aspirations for the future. Lifelong learning policy was affected by such circumstances, shifting its focus from the new liberal principles originating at *Rinkyoushin* to a supportive role in the country's recovery from the crisis. Against this background, the reshaping of lifelong learning policy took place. *How did lifelong learning policies change?* This is the question explored in the next section.

2. Policy Reformulation

1) Combat *Kyouiku Kouhai*

It is widely agreed that the current priorities in the government's development of lifelong learning policy are schools, families and communities.[a] This section suggests that the lifelong learning policy was reconstructed in response to deteriorating *kyouiku kouhai* [the desolation of education].

After the watershed in the first half of the 1990s, the educational crisis, *kyouiku kouhai*, worsened. In Fujita's term, it was "the new desolation [*atarashii are*]".[19] This refers to serious demoralisation in the schools, i.e. children's problematic behaviour including

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[a] For example, Sawano phrases the priorities as, "children and *kyouikuryoku* [the ability to educate] of communities and families"; in Satou's words, "raising children, life after retirement in the local community and community building"; and Suzuki emphasises, "the fusion of school and the society [*gakusha yuugou*] which encourage cooperation between local communities and families".

'class disruption [*gakkyuu houkai*]', becoming hysterical [*kireru*], becoming violent for trivial reasons, continuing to chat and ignoring the teacher during class, together with an increase in violence at school, serious crime, drug use and girls' juvenile delinquency. 'The new desolation' had become more extreme and worrying than the problems experienced before.[20] Moreover, indiscipline and criminal behaviour and crimes were not the only elements of 'the new desolation'. "A decline in academic attainment [*gakuryoku teika*]" had been in evidence since the mid 1990s. For example, there were quite a few lower secondary school students who could not solve fractional expressions, and some university students who did not know the use of basic pronouns in English. These findings relate to both lower and upper secondary school, and university.[21]

Amongst this 'new desolation', however, the most disturbing tendency was an increase in vicious school-related crimes. According to the statistics given by the National Police Agency [*Keisatsuchou*], by 1997 there were a large number of children and young people[a] who were committing vicious crimes.[22] One of the most striking examples of a serious crime committed by a young teenager was Kobe's serial killing and wounding in 1997 [*Sakakibara jiken*]. A 14 year-old male pupil conducted "a ritual" – killing – which he said was enjoyable. He killed younger school pupils and left part of one of the bodies at the gate of his school. His motive was not clear, but he had written letters to a newspaper office criticising the school and police.[23] In 1998, at a lower secondary school in the Tochigi Prefecture, a thirteen year-old male pupil stabbed his female teacher to death [*Kuroiso naifu jiken*]. The teacher told him not to be late for the lesson, so he tried to scare her with a knife; but she did not show any fear, so the pupil stabbed her.[24] More shocking killings followed in the late 1990s: a eighteen year-old male upper secondary

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[a] Aged between twelve and nineteen including those who go to school and those who do not.

school student, who had been excluded from school, hijacked a bus and killed a passenger [*Nishitetsu basu nottori jiken*]; a seventeen year-old male upper secondary school student who belonged to a baseball club killed junior students and his own mother with a baseball bat [*Okayama kinzoku batto jken*].[25] Another example of atrocities at school is the killing and wounding at the Osaka Education University Ikeda Primary School of 2001 [*Osaka kyouiku daigaku fuzoku shougakkou no rannyuu sasshou jiken*]. A 37 year-old man who had had an unfulfilled dream to enter a national primary school conducted a revenge attack on a prestige school and killed and wounded several innocent school children.[26]

There are two significant characteristics to these school-related crimes committed in the 1990s. First, the nature of the crimes was more heinous and abnormal than any that had occurred previously.[27] Nobody could have imagined that a lower secondary school student would develop a plan to cut off part of a schoolmate's body. Second, as Sawano notes, although there had been a number of children's crimes before the 1990s, they had usually occurred outside school. From the 1990s onwards, however, more "crime scenes" were "at the school site".[28] Moreover, the young criminals often left a written or verbal statement which criticised the education system or school education in Japan,[29] as did the pupil involved in the killing in Kobe.

Society's reaction to this unaccustomed deterioration was a mixture of shock, anger and perplexity. Fujita argues that 'the new desolation' could not be dealt with simply as "problems stemming from the stressful school system"; the recent phenomenon was a "societal pathology" rather than a mere "educational pathology". Children's problematic behaviour derived from their background and upbringing which included their family and local community environments.[30] But the mainstream perception was that the rigid,

uniform and exam-centred education system had suppressed "creativity and individuality" and had caused "bullying, school refusal, and other problems".[31] Public opinion tended to blame the education system, considering that school was neither safe nor trustworthy any longer and that something had to be done within school as soon as possible.[32]

Kyouiku kouhai, which was not a single phenomenon but an accumulation of deteriorating situations such as the dysfunction of school and the increase in children's serious crimes, became more serious through the 1990s. Educational discussions concentrated on how to overcome *kyouiku kouhai*. At the same time, reacting to *kyouiku kouhai*, lifelong learning policy came to address school issues more than in earlier years. The Japanese government assigned an important role to this policy in education reform.

The first concrete documents on education reform policy after the acknowledgement of the worsening of *kyouiku kouhai* were two Reports created by the Central Council for Education in 1996 and 1997 entitled *The Model for Japanese Education in the Perspective of the 21st Century*. Taking over the main arguments of *Rinkyoushin*, the Reports called for "great reform in Japanese society as a whole".[33] "Individual abilities and aptitudes", "self-discovery" and "self-realisation", and originality, creativity and talents would, the Reports argued, enable children to cope with rapid social changes.[34] But what was original to the Reports was a humanistic dimension to the school reform. "*Ikiru chikara* [zest for living]"[a] was first introduced, and "*yutori* [room to grow]" was reemphasised.[b] Education should foster *ikiru chikara* and *yutori* in children so that they

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[a] According to the Ministry's Secretariat of the Lifelong Learning Policy Bureau, Terawaki, *'ikiru chikara'* refers to: first, having one's own opinions; second, having the ability to be able to convey one's own opinions; and third, having the ability to balance to work with others accepting differences and conflicts (2002).

[b] *'Yutori'* was first introduced in revising the Courses of Study in 1977 (Fujita, 2000, p.319).

become able to identify, think about and solve problems by themselves.[35] The two concepts have since become central to the school reform policies. There was also an appearance of the concept of "emotional education"[36] in the Reports. Emotions are about caring and loving others, and enriching emotions develops *ikiru chikara*. With enhancing emotions as well as *ikiru chikara* and *yutori*, independent and responsible individuals are fostered, and they will then be able to construct "a full and mature society" in which different values coexist but with harmony.[37]

Since these Reports, *'ikiru chikara'* and *'yutori'* came to appear in the policy domain of lifelong learning. One of the Lifelong Learning Council's Reports, for example, discussed the role of a local community in fostering *ikiru chikara* in local children. The expansion of more opportunities for children, the construction of children's playgrounds in the community, the establishment of an infrastructure to promote children's experiences and activities in the community were proclaimed. To achieve such initiatives, collaborative partnerships between schools, parents, local governments and the private sector were stressed.[38]

Parallel to these workings of the Central Council for Education and the Lifelong Learning Council, the Educational Reform Programme [*Kyouiku Kaikaku Puroguramu*] was undertaken in 1997. The educational reform was positioned as one of the prioritised six reforms.[a] The Programme admitted that the education system had neglected to foster individuality and abilities to learn and think, because of the focus on equality and delivery of knowledge. Such an approach resulted in the excessive competition of entrance

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[a] The six reforms are in: the administration; the economic structure; the financial system; the social welfare structure; the finance structure; and education.

examinations, the drop in "*kyouikuryoku* [the ability to educate]" in families and communities and the increase of bullying, absenteeism and juvenile delinquency.[39] Change had to be made through "education of the mind [*kokoro no kyouiku*]"[40] so that children would have "a sense of justice, kindness, creativity and consciousness as members of international society".[41] The significance of the programme was, as Kunisuke points out, one of the components of the national restructuring project. The six reforms as a whole were positioned as the prioritised project: i.e. each reform should be undertaken within the framework of the national restructuring project. As Kunisuke argues, the large-scale reform project indicated that Japan was in the middle of a transition of the whole national system in which restructuring of public education was included. "Shifting to a lifelong learning system" and the "deregulating of school education" were a means of restructuring the state.[42]

Since *Rinkyoushin*, the scale and the urgency of the school reform increased with a stronger emphasis on the need of emotional and moral education. This was reinforced when one of the MESSC surveys showed that children who have richer experiences of life and nature in a local community tend to have a higher sense of morality and justice.[43] It was stressed that 'education of the mind' had to be undertaken with the understanding and movement of every part of the society so that traditional Japanese values such as diligence, sincerity and respect towards nature, and history, tradition and cultures are passed on to the next generation.[44] Emotional education, which encompasses fostering *ikiru chikara* and moral values, was kept at the forefront; also, Japanese culture and tradition were more and more emphasised. The desolation of education was no longer a problem of and for the school only, and the problems of Japanese education came to influence the whole society. The government realised the need to involve the whole population in reforming society.

Also, 'the family' as a unit of a community has been a part of this discussion. An advisory committee, the National Commission on Educational Reform (National Commission) [*Kyouiku Kaikaku Kokumin Kaigi (Kokumin Kaigi)*] operated in 2000 argued that: "The starting point of education is at home". The idea of "empowering families" was needed to foster "open and warm-hearted" Japanese within a good collaborative environment of schools, families and a community.[45] The Minister of Education, Touyama stressed this argument: "'Education of the mind' which is to foster rich human nature is fundamental to whole education. Family education, although it is essentially a private arena, plays a large part in this."[46] The fostering of children by the whole community was keenly promoted.

The major implementation of the education reform policies includes, first, the introduction of a new subject in 1998 titled Integrated Study [*Sougouteki Gakushuu*][a] which aimed to expand children's experiences: e.g. volunteer work, surveys, experiments, hands-on activities. The design and the content of the subject were left to each school, although the MEXT gave a guideline.[47] In 2002, there was another significant change in the school system: the introduction of the New Courses of Study [*Shin Gakushuu Shidou Youryou*], said to be "the most radical [change] since the introduction of a national curriculum in the late 1950s".[48] To foster *ikiru chikara* in children, the government considered that it was necessary to reduce the amount of compulsory study. A five-day school week was introduced, the school curriculum was reduced by 30 percent, and the number of hours of

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[a] According to MEXT, Integrated Study refers to: 1) educational activities which can be designed creatively by schools in correspondence with the circumstances of pupils, schools and the local community; 2) learning experiences which address agenda such as international understandings, information technologies, environment or welfare and health, overarching conventional curricula (2003, http://www.mext.go.jp/a_menu/shotou/sougou/index.htm).

lessons was cut down to 70 percent in both lower secondary and upper secondary school.[49] Such changes would "cultivate in children a rich spirit and strength by increasing opportunities for them to participate in outdoor activities and experience social interaction".[50] At the same time, there was an introduction of voluntary social services [*houshi katsudou*], which were made compulsory.[51] Its purpose was to foster "a fundamental sense of morality" by which was meant: "an attitude of respect for the individual and reverence towards life in the home, in school, and in greater society".[52]

There was also a drastic measure taken to combat *kyouiku kouhai*: the amendment of the Juveniles Act in 2000. The idea was to "punish" the children who committed serious crime, treating them as criminals rather than responding by "educating" them. The level of the punishment age was lowered to 14 from 16.[53]

In the implementation of lifelong learning policies, the priority in school-related issues can be identified as well. For example, for the fiscal year 2002, the Lifelong Learning Policy Bureau set twenty concrete initiatives.[54] These included: The New National Children's Plan [*Zenkoku Shin Kodomo Puran*] which was to support children's learning and activities in local communities following the implementation of the five-day school.[55] A school-community relationship was enhanced by opening school to local communities. The information on school policies, school activities and school management as well as school facilities and educational functions was made available to the public.[56] 'Let's Have a Talk With Children [*Kodomo to Hanasou*]' was a national campaign which involved as many members of society as possible to tackle existing problems associated with children and young people, such as bullying and absenteeism.[57] There were quite a few supportive initiatives for parents in bringing up children. The Networking of Supporting Child Rearing [*Kosodate Shien Nettowaaku*] was to offer counselling and advice to

parents and a 24-hour telephone consultation service.[58] Guidebooks and videos were created to help parents who have difficulty in raising children. These included: The Family Education Diary [*Katei Kyouiku Techou*]; Father's Participation [*Chichioya no Sanka*]; and Home Discipline [*Shitsuke*].[59]

Thus, as a MEXT official, Kameoka[a] points out, educational activities outside school, family education and volunteer activities became the prioritised agendas in lifelong learning policy.[60] 'Communities' were given a role of bridging school reform and lifelong learning. Moral education and social activities were increased, and the emphasis on academic knowledge and examinations was reduced. With the drastic change of cutting the school hours and changing the curriculum contents, children were given more free time in which they were expected to enhance their *ikiru chikara* and *yutori*. The school reform undertaken to overcome 'the desolation of education' had an impact on lifelong learning policy.

The government's recent approach to tackling *kyouiku kouhai*, however, invited debate. It is often claimed that 'the new desolation' was a consequence of the new liberal reform policies implemented as a result of *Rinkyoushin*, which had promoted individuality and *yutori*.[61] Examples of the policy implementation promoting individuality are the increase in the number of specialised schools and qualifications to enable more varieties of higher education, the introduction of English education at elementary school and the reduction of the university entrance age to 17. In promoting '*yutori kyouiku* [education which fosters room to grow]', quite a few policies were implemented: free choice of schools, the

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[a] The head of the Local Community Policy Unit [*Chiiki Seisaku Shitsu*], Lifelong Learning Policy Bureau, MEXT.

expansion of comprehensive schools[62] and the New Courses of Study [*Shin Gakushuu Shidou Youryou*] which brought about a reduction of the content and the hours of the school curriculum together with the introduction of the five-day school week.[63] These initiatives were criticised because of their implications for elitism or meritocracy.[64] Lower study loads could allow able pupils quicker and further advance but may not guarantee basic literacy and numeracy to other pupils. The explanation of the MEXT was that the Courses of Study were "the minimum requirements", but there was a risk.[65] Fujita warns that the education system would become discriminatory and divisional, and children's life would be more separated from the local community with an expansion of individualism.[66] As Arai points out, the direction was against the aim of a lifelong learning society which was to reform *gakureki shakai*: initiatives such as creating more qualifications could enhance the over appreciation of qualifications.[67]

On the other hand, the nationalistic aspect, the other dimension of new liberalism – originally expressed as 'healthy nationalism' by then Prime Minister Nakasone in the 1980s – took shape with a strong moral focus. Fujita argues that this led to the emergence of a conflict against the elitist and meritocratic approach: i.e. between individual choice and moral obligation. Until the National Commission of which he was a member, education reform policy had aimed to make the education system flexible: e.g. the expansion of various systems for entrance examinations or the promotion of individuality and *yutori*. The Commission's strategy was new, proposing service activities [*houshi katsudou*], education to respect Japanese culture and tradition, severer measures for problematic children and education of morality and sociality.[68] The Commission's proposals of education reform were torn up in conflicts over the new liberal stress on individualisation, free choice and competition, and the spiritual position which emphasised morality, the spirit of service, culture and tradition, and love for family and the

country.[69] The danger of compulsory service activities was often acknowledged.[70]

Fujita states that the majority of the members of the National Commission took the elitist and meritocratic direction for granted since it had been a continuous approach during the previous decade. The political and economic approach had been revitalising the economy through deregulation and structural reform, reducing deficit finances and emphasising effective administration and accountability; whereas socio-culturally, enhancing diverse life-styles and values, encouraging free choice and a respect for individuality – the rhetoric which justifies selfishness – had been the focus of the elitist and meritocratic reform.[71] The moral emphasis arose from anger and sense of a crisis against selfish and dangerous children and young people who had committed vicious crimes, and against aimless and apathetic children and young people who had lost interest in learning. Additionally, there was a recognition that the educational reform, which had emphasised individuality and *yutori*, had ended in spoiling children and young people. The introduction of obligatory service activities derived from this perspective.[72]

There is an indication that the conflicting ideologies derive from different circles of commentators. The first included conservative politicians and conservative central and local bureaucrats, i.e. some on the right, who wished to keep 'state bureaucratic control', stressing patriotism, Japanese tradition and culture, and moral education in education reform. The second circle was business and bureaucrats and the urban middle class who supported new liberalism, and, with it, deregulation, marketisation and an emphasis on creativity and individualisation in education reform. Teachers' unions were the third circle, which promoted participation and local and school autonomy, and they also demanded smaller class sizes and more resources. The fourth circle contained the groups on the left, e.g. the liberal urban middle class, which emphasised high school education for all and

the termination of high school entrance examinations.[73] These different patterns in the principles of education and learning had always existed, making policy-making process difficult.

However, the differences were more visible in the 1990s, which was reflected in the policy-makers' struggle and unclear vision of education reform and lifelong learning. The conflicts illustrated the difficulties of the government and the society in facing and dealing with *kyouiku kouhai*. At the same time, unstable and contradictory reform policies obstructed the process of the recovery from *kyouiku kouhai*. The dismay and the loss of confidence in society, combined with children's serious crime and declining educational achievements, led to a collapse in educational values and conflict in the reform policies; and the collapse and the conflict, in return, worsened the state of *kyouiku kouhai*.

Along with this process, some other processes can be identified.

2) Stabilising the Political Situation

In terms of the timing of the active policy-making of lifelong learning, political stability was both important and necessary. The Lifelong Learning Council issued its first Report in 1992, but it was not until 1996 that the second Report came out. This section suggests that as a result of this unstable period of politics, the policy-making of lifelong learning slowed down. It was reactivated when the political stability was restored in the mid 1990s.

The four-year gap between the first and the second Lifelong Learning Council Reports fell within the period of political instability mentioned above, when Prime Ministers were resigning one after another. Administration cannot function properly when the political

situation is not stable.[74] That is one of the reasons why the first half of the 1990s did not see much policy formulation and implementation for educational reform and the development of lifelong learning and why, effectively, the process had to be restarted in 1996 when Hashimoto came to power. The political instability was reflected in the Japanese authority's lack of a clear and solid idea of what kind of country was to be created.

After the second Report in 1996, the Lifelong Learning Council produced another four Reports continuously during the rest of the 1990s. All these Reports discuss 'communities' in one way or the other. Concerning the building of a learning community with firm partnerships, an approach, "*gakusha yuugou* [the fusion of school and the society]"[a] was introduced.[75] *'Gakusha yuugou'* means in practice to unite the local community and to vitalise the interactions between different age groups and different institutions. In relation to social education, networking all the partners in the community is emphasised, and "*nettowaaku gata gyousei* [a network model of administration]" was put forward. With the involvement of a local population in the education administration, MEXT argued that the community could be revitalised and all members of the community could be brought together.[76] Responding to *shakai kouhai* [the desolation of society], the strategy taken by the Lifelong Learning Council was promoting the building of a firm network in communities.

Shakai kouhai in which political turmoil played a part affected the policy-making of lifelong

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[a] According to Yamamoto, *'gakusha yuugou'* refers to: the creation of an activity which can be treated as either school education or social education, or the relocation of an ongoing activity which is undertaken in either school education or social education (quoted in Kobayashi, Shinchi and Kuroki, 1998, p.12).

learning during the first half of the 1990s. The restarting of the policy-making enabled political restoration and emphasised 'communities'. The emphasis, however, largely stemmed from a grass-roots phenomenon: the increase of civic awareness.

3) Expansion of a Grass-roots Movement

This section suggests that the collapse of the Bubble Economy and the Hanshin/Awaji Earthquake have led to the expansion of a grass-roots movement of volunteer participation in community building and social services, and this has affected lifelong learning in a major way.

After the collapse of the Bubble Economy, lifelong learning policy addressed employment issues to support the unemployed population and to strengthen limited employment opportunities for new graduates. Although labour policies are controlled by the Ministry of Health Labour and Welfare, there was an influence on the MEXT's lifelong learning policy. A MEXT official, Kameoka, points out that due to the recession, MEXT recognised the need for the provision of vocational training and accredited courses. Until the Bubble collapse, the lifelong learning provision had mainly been for self-fulfilment and pleasure, but after 1991, learning for employment and career development emerged as a motive.[77]

On the other hand, as Arai indicates, the collapse of the Bubble Economy contributed to the development of a civic movement.[78] Material fulfilment was questioned, and people's interest in person-to-person relationships expanded as part of the quality and meaning of life. This change eventually led to a dramatic increase in people's interest in civic activities and volunteering. Industry was responsive as well: for example, the Japan

Association of Corporate Executives [*Keizai Douyuukai*] issued a report[a] on education reform in which the dismantling of schools was discussed.[79] There is an indication that the onset of an economic recession made the business sector cautious and reluctant to take part in the practice of lifelong learning.[80] The collapse of the Bubble Economy reinforced the government's new liberal approach to learning – the emphasis on qualifications – but at the same time, produced grass-roots awareness of participation in the community. The latter became the focus in lifelong learning policy, not least as a reaction to a natural disaster.

Furthermore, the inefficient and ineffective decision-making of the national and local governments after the Hanshin/Awaji Earthquake had a positive spin-off effect. In various aspects of the rehabilitation of the region – e.g. rebuilding residences, schooling or nursing – the public voluntarily participated. Citizens gathered from all over the country, wishing to contribute to the rehabilitation process. In 1995, often called "the first year of volunteers" or "the volunteers' revolution", the expansion of the volunteer movement took place.[81] Thus, this year of the Hanshin/Awaji Earthquake, a natural disaster led to people participating in social activities with increased awareness and involvement.

It should be mentioned that in policy terms, 'volunteer activities' had been discussed before the earthquake. In the first Report of the Lifelong Learning Council, volunteer activities were already highlighted. Three different viewpoints that link volunteer activities and lifelong learning were identified: first, a voluntary activity itself can be a form of lifelong learning which leads to self-actualisation; second, lifelong learning takes place in

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[a] The report was entitled: *From School to Community-based Learning Centres: Schools, Families, and Communities Being Aware of their Educational Responsibilities, and Each Giving of its Wisdom and Power to Create New Places to Learn and Grow*.

the obtaining of the new skills and knowledge necessary to become a volunteer, and becoming a volunteer is a means to use and practise the new learning; and third, these processes can support people's lifelong learning and as a result, lifelong learning can be promoted.[82] Nevertheless, until the earthquake, this practice was limited, and it was really as a direct result of the earthquake that the public interest was energised.

The influence of the rise of a public awareness of the principle of participation in lifelong learning is widely acknowledged by civil servants and academics.[83] Until the beginning of the 1990s, market principles in response to the needs of lifelong learning were stressed. In the Lifelong Learning Promotion Act of 1990, for example, "the use of private enterprises" was encouraged. The focus of lifelong learning policy began shifting after the watershed of the first half of the 1990s when the country experienced *kyouiku kouhai*, the Bubble collapse, political instability and the earthquake. Since the mid 1990s, the Reports of the Lifelong Learning Council has treated 'communities' as a central theme in the debate on lifelong learning.[84] Volunteer activities became a means of educating children and young people and enhancing the bond of schools, families and communities. Volunteer groups and non-profit organisations (NPOs) were for the first time located as one of the components of local partnerships. The positive roles of community and volunteer activities are recognised, and learners are encouraged to bring their learning results back into their local community. Also, ICT is treated as an important tool for community development.[85]

Machizukuri – community building – has become both a means and an end of lifelong learning in Japan. The promotion and implementation of lifelong learning in the communities by the communities is encouraged. As MEXT puts it: lifelong learning is the energy for "a lively life".[86] "It is pleasurable to be actively involved in and communicate

with the community through learning. . . . A society in which people enjoy learning will become a better society."[87] Anybody can start learning, enjoy the learning experience and share it with society. One is strongly encouraged to take part as a "lifelong learning volunteer" – such as visiting old people's residences or cleaning parks.[88] With such participation, it is expected that "harmony" and "symbiosis" of the local community will be enhanced.[89] The government's argument is that with a collaborative relationship between schools, families, employers, voluntary organisations and local governments, both individual and community needs can be met. In the 1990s, as Sasaki argues, the Japanese lifelong learning policy continued to stress "individuality" and "self-actualisation", but at the same time, these were discussed within "the relationship with others".[90] 'Community building' and 'lifelong learning' have become inseparable.

The Japanese lifelong learning policy, which had originally been formulated by *Rinkyoushin* on the basis of new liberalism making the shift from *gakureki shakai*, went through these reshaping processes in the 1990s. Difficult political and economic moments and an unpredicted natural disaster contributed to the reshaping of lifelong learning policy, which became community-focused. There were, however, other types of change taking place. These processes are linked with certain features of Japanese society. In examining how Japanese lifelong learning policy changed, these features are significant, and are analysed in the next three sections.

4) Inexperience in Civic Participation

One of the features in Japan is that society lacks maturity in civic participation. This section suggests that this also influenced the reshaping of the lifelong learning policy in Japan.

The recent increase in the number of volunteer groups and non-profit organisations [NPOs], which was largely triggered by the Hanshin/Awaji Earthquake, shows an increase in people's interest and awareness in contributing to the improvement of their community. In response to this phenomenon, the education administration has positioned voluntary activities as central to the promotion and practice of lifelong learning.[91] Volunteer groups and NPOs are often seen as a form of "civic participation [*shimin sanka*]". The theory is that such participation is part of the construction of a "civil society", i.e. a society in which citizens themselves undertake social reform.[92] To put it another way, lifelong learning in Japan is becoming "the Civil Society Model"[93] in which people are willing to "contribute to the well-being of people, civil society, government and community".[94] Moreover, there is an expectation of the actualisation of "NPO-led"[95] society in which NPOs function on behalf of the nation state, offering social services and collecting tax.[96]

Nevertheless, whether the Japanese form of civic participation is, borrowing Maehira's words, "real participation" or not, is open to question. Maehira argues that there is a need to establish "a system for real participation". The system should foster participants' potential for advocacy,[a] although that should not be the only objective of the organisation. The system should enhance participants' acquisition of new knowledge and experiences – an important form of informal learning – during the participation process.[97] However, it is likely that 'participation' is understood simplistically. First of all, the increase in the number of volunteer groups and the fact that more of these groups are shifting to a NPO, with a corporation status, does not directly mean that the bodies are civically functioning

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[a] 'Advocacy' refers to lobbying against the government, the local administration, industries and society (Tanaka, 2001, p.156).

organisations. In other words, 'participation' can be a mere slogan or a formality, can have an element of compulsion or ritual or can entail conflicts amongst participants with different values and benefits.[98] Or, people may participate simply because of personal interest without any intention of public contribution and political involvement. In short, the participation may in reality be 'cosmetic'.

This private dimension of 'participation' is explored by Muro in depth.[99] Drawing on a public-opinion poll, he indicates that in Japan, the public awareness towards civic contribution and participation has dramatically increased since the end of the 1980s. However, Muro goes on to argue that 'civic contribution' is not the only motivation of one's participation in a voluntary activity; it is often the case that people expect personal benefit, e.g. the acquisition of knowledge or skills through the activity. This duality of motivation is usual in civic participation, but Muro differentiates the roots of the awareness of participation in Europe and America, and in Japan. In Europe and America, civic awareness is based in the pursuit of emancipation from administrative control after the political establishment of rights. But in Japan, the awareness stems from a personal search for another form of "the fulfilment of life [*ikigai*]",[a] which is often pursued through the building of a network with others.[100] Thus, historically, the Japanese notion of civic participation tends to address personal aims rather than societal goals. With this analysis, it can be concluded that the perception in Japanese society – i.e. that the rise of the awareness of public participation leads to a mature society where citizens are fully aware and participatory – is worth revisiting.

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[a] *'Ikigai'* is often used in phrases such as 'I have *ikigai*', which means 'to have something to live for', or '*ikigai* o kanjiru', which means 'to find life worth living'.

There has been a criticism that the immaturity in civic participation derives from the central government's bureaucratic decision-making, i.e. the top-down command system and a vertically divided administration. Wray, for example, suggests that the belief of state leadership has been persistent, and almost every sector, including education, has been controlled by the state. One of the reasons for this is the country's project, "catching up the West", and Japanese leaders have endeavoured for more than a century to achieve that.[101] Also, the Japanese tend to think that "wisdom comes from the top", "looking upward for answers and orders". Before "authority, rank, hereditary, and educational pedigree", the people are weak and passive. "The notion that education is a task of the national government" is so strong that educators and administrators "seek uniform judgement or directives from above".[102] Bureaucrats are seen as the specialists in knowing what is best for the country, and therefore people tend not to participate actively in politics and prefer orders from the top.[103]

The lack of the understanding of civic participation is reflected in all aspects of society. Firstly, local governments have not had enough experience in local citizens' involvement in decision-making. The public has criticised bureaucratic decision-making; but the ongoing decentralisation is on occasion resisted by local governments too, since they often do not know what to do.[104] In the area of lifelong learning, the role of MEXT is to organise the system and to support local communities, but concrete measures are supposed to be selected and implemented by each local government and the community. A guide on 'how to' used to be offered by MEXT, and institutions at a local level are not yet familiar with doing it by themselves.[105] For example, with its autonomy and independence guaranteed, the Board of Education [*Kyouiku Iinkai*] has had control over local educational policy-making. The Board tends to lack collaborative working relationships with the education administration and the local population. Often local

governments criticise the closedness of the Board, and the local population claim that their voice is rarely heard by the Board.[106]

There are also some problems in volunteer groups and NPOs, which are said to be a form of civic participation. The first concerns the lack of notion of partnership. There is an indication that local civil servants in general do not necessarily have an understanding of or supportive attitude towards volunteer groups and NPOs. The awareness that citizens themselves are an active group, which may itself be of public benefit and that local government and the community should work together as partners to improve the community, tends to be poor.[107] Teachers, as well, often hesitate to accept the local population as a partner. As one survey showed, one of the biggest obstacles to 'the fusion of school and the community [*gakusha yuugou*]' is "the difficulty in obtaining teachers' understanding and cooperation".[108] Conversely, schools, civic bodies and local administrations wish to develop partnerships but because of the cultural principle of seniority, a political hierarchy is created;[109] under the name of 'partnerships', a rigid organisational structure can sometimes develop [110] before the establishment of comfortable working relationships. Or, in a group or a community where homogeneity is excessive, heterogeneity tends to be excluded: i.e. non-participants are labelled as "those who do not contribute to public good".[111]

Another aspect of the immaturity in civic participation in Japan is the lack of general interest in politics. Satou considers that, generally, Japanese people do not intend to be involved in or to influence politics. Public participation in politics is low in Japan, and there is deep-rooted distrust towards politics. The basis of the expansion of 'participation' is, rather, derived from the increase of "village feelings [*mura ishiki*]",[112] that is, to help others and to develop a bond. A society in which 'village feelings' are strong is similar to what

Duke refers to as a "group-oriented society",[113] where "traditional cultural value goals of creating order, harmony, and socialisation processes foster exclusive, conformist, and inflexible behaviour patterns".[114] Satou goes on to indicate that within an overview of Japanese politics, it is difficult to identify civic participation since the politics is still "village politics [*mura seiji*]".[115] That is, Japan does not have direct democracy in which the opinions of the opposition are readily heard.[116] Nakabou, a lawyer, points out that after the Bubble collapse, Japanese society lost its direction: the economy, politics, education and society have since then faced confusion and blockage, and the public simply do not know how to be independent and to be autonomous.[117]

Thus, Japanese society's inexperience in civic participation is recognisable despite the actual increase in terms of the number of volunteer groups and NPOs as well as the promotion of community-focused social reform. The idea of community building by the local population has become an important component of lifelong learning, but it is too optimistic to consider that such a strategy will lead to a civil society straightaway. The expectation is that a lifelong learning system will help citizens learn what a civil society is all about, encouraging independent discussion and decision-making.[118] To make that happen, however, not only the awareness and incentive of individual citizens need to become higher, but also, the norms of decision-making process in Japan need to be altered.

Immature development of civic participation is also related to a question about accountability and the public benefits [*kouekisei*] of public policy. In the area of lifelong learning policy, at present, the government's rationale in pursuing public benefits is through the promotion of volunteering. It is seen that accountability lies in the activities of community building including the promotion of 'the fusion of school and the society

[*gakusha yuugou*]'. For the members of a volunteer group or a NPO, such activities are in themselves a learning process; and at the same time, the group or the organisation is a generator of public benefits. Also, social services in the new school curriculum are considered 'public'. The public learn through publicly provided learning opportunities, gain some knowledge or skills and then return the learning results in the form of volunteer activities to communities. Coinciding with the expansion in the number of volunteer groups and NPOs, the strategy to promote voluntary activities as a means to justify public learning has widely been approved. The emphasis on civic participation can be seen as the enhancement of public benefits.

Nevertheless, the question of the public benefits of lifelong learning policy encompasses dilemmas. Fundamentally, if lifelong learning is claimed to be 'all kinds of types of learning which take place wherever and whenever', then a more precise definition of 'learning' can be a difficult task in itself. It may be narrowed down, as Okamoto points out, to "intentional learning" taking place through learning activities which are dealt by the education administration. But the next question is then, as Arai points out, how to classify "an intentional learning" as "public" or "private".[119] It is not simply a matter of whether or not the learning opportunity is subsidised by public money because amongst publicly funded courses, there are quite a few self-enjoyment courses which are unlikely to be considered as public learning although these can, as the government claims, benefit the public if the learning outcomes are returned to the public through for example, volunteer activities. Then, there is another issue; that is, what are the criteria that determine which volunteer activities are beneficial to the public?

The other dilemma is also pointed out by Satou, who argues that the current lifelong learning policy is based on contradictory ideologies: individualisation [*shijika*] and the

public involvement [*koukyousei*]. Individualisation, a principle of *Rinkyoushin*'s reform policies, has been promoted through liberalisation, privatisation, decentralisation and deregulation of the provision of learning opportunities; on the other hand, there has been an emphasis on benefiting society through the practice of lifelong learning, i.e. volunteering, community learning and citizenship education.[120] In other words, both 'private' and 'public' learning opportunities have been promoted and provided as 'lifelong learning policy'.

There is also a dilemma in the treatment of volunteer activities. They no longer stand as truly 'voluntary' once they are promoted as a public policy, since an aspect of compulsion is present. An example is in Kobe Prefecture: the local administration requires each citizen to register as a 'volunteer' teacher in any kind of subject.[121] It is ironic that the local population is thereby forced to participate in a volunteer activity. A similar approach can be found in the school reform policies; under the New Courses of Study, service activities [*houshi katsudou*] are made obligatory [*gimuka*]. In either case, the activity is no longer 'voluntary'.

Another example concerns the process of 'qualifying' volunteers. The provision of special training courses for volunteers,[a] for those who wish to obtain the skills and knowledge required to be a volunteer, is increasing. But there is a concern as to whether a volunteer should be 'qualified' because once a distinction between the 'qualified' and 'non-qualified' volunteers emerges, a volunteer group or a NPO may prefer to recruit as many 'qualified'

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[a] An example is Lifelong Learning Instructor Training Course [*Shougai Gakushuu Shidousha Yousei Kouza*] provided by Research Institute of Practical Education [*Zaidan Houjin Jitsumu Kyouiku Kenkyuusho*]; the course is approved by MEXT (Research Institute of Practical Education, 2002).

volunteers as possible. Thus the number of 'qualified' members might be interpreted as a determinant of the quality of the volunteer group or the NPO, and that could lead to the creation of a 'league table' of voluntary organisations, and an unintended stratification. There is therefore a danger that qualifications, and a membership of a 'good' organisation might become the criteria against which the good practice of 'voluntary' participation is measured.[122]

The recognition of the need for further debates about public benefits has increased,[123] but a specific solution does not yet seem to have been found. Higuchi, for example, claims the need for a new perspective on the public benefits of promoting lifelong learning, responding to the expansion of the number of volunteer groups and NPOs. He argues that volunteer groups and NPOs have a new role in the promotion of lifelong learning as grass-roots contributors, creating learning opportunities, and as providers of learning activities, bringing public benefits.[124] Similarly, Uesugi argues that the relationship between the state, local governments and citizens should be reviewed so that lifelong learning policy could pursue public benefits, departing from the promotion of profit-making provision – private benefits.[125] These kinds of commentaries are becoming mainstream, but the detailed plans for the actualisation of public benefits of lifelong learning have yet to be seen.

Currently, both the Japanese government's solution to societal problems and the public interest involve the development of 'communities'. The government's approach is to make the current lifelong learning policy feasible and accountable by positioning voluntary participation particularly in community building, which brings 'public benefits'. However, if lifelong learning policy is to contribute to civic participation and ultimately, to the building of a civil society, there are some complex dilemmas faced in the

government's treatment of 'volunteer activities' as well as in the awareness of 'civic participation'. In everyday social life, the participation of the public was increased, however, the new value was not necessarily understood and has not been fully exercised by the people.

Another feature of Japanese society which reshaped lifelong learning policy through the 1990s is the strong value placed on education by society. In the case of Japan, the effect was strong enough to contribute to the reshaping of lifelong learning policy.

5) The High Valuation of Education

In Japan, 'education' and 'learning' have been highly valued and, as this section suggests, such a social value has contributed to the reformulation of lifelong learning policy. This long-standing value has been reflected in the spiritual approach to the policy-making of lifelong learning but has created difficulty in the treatment of lifelong learning by administrative authorities.

Education is often termed as "sacred [*seiiki*]" in Japan.[126] Okamoto has argued:

> the fundamental purpose of education in Japan is surprisingly defined in nothing but spiritual [terms] . . . . Indeed this fact is not unrelated to the unusually high priority placed on education in Japan. Moreover, because education is believed to be more than the acquisition of knowledge and skills: [*sic*] something with a highly spiritual purpose, the Japanese consider it, in fact, something extremely lofty.[127]

"A highly spiritual purpose" of education is partly signified by the emphasis on "whole-person education [*zenjin kyouiku*]".[128] This emphasis is captured in the Fundamental Law of Education of 1947:

> Education must be carried out with the intention of aiming at the full character development of all people and at nurturing the citizens who, as the builders of a peaceful nation and society, will cherish truth and justice, respect the value of

> the individual, value hard work and responsibility, have independent minds, and be physically and mentally healthy.[129]

The emphasis on character had already been seen in the Education Code of 1872, in which early Meiji leaders' aspiration to catch up with the West was expressed. The importance of a person's character in achieving a goal was stressed:

> It is only by building up his character, developing his mind, and cultivating his talents that man may make his way up in the world, employ his wealth wisely, make his business prosper, and thus attain the goal of life. . . . Learning is the key to success in life, and no man can afford to neglect it . . . there shall, in the future, be no community with an illiterate family, nor a family with an illiterate person.[130]

When education under American occupation was about to start, the Chairman of the Council on Educational Reform argued: "The aim of education must be the development of individuality founded on the freedom of learning."[131] The Japanese interpretation of this principle has permitted the emphasis on educating 'the whole person' to remain unchanged after World War Two.

Ever since, curricula have aimed at "all-round development", including not only Japanese language, maths and science, but also physical education, domestic science and moral education. Moral education had been compulsory since the early 1960s,[132] but besides the subject itself, as Marshall points out, the teaching of moral values has been "perennial".[133] A wide range of activities was used to foster moral values such as friendship, cordiality, co-operation and discipline.[134] Japanese teachers, therefore, have had an important role "to develop well-rounded 'whole people', not just intellects".[135] Many teachers believe in an education which can foster a balanced person who has both academic knowledge and good personality. Such a kind of person will be able to succeed in life and to live happily throughout life.[136] In a survey in which Japanese elementary school teachers were asked to rank goals of education among eight

categories, “personal growth, fulfilment, and self-understanding” and “human relations skills” ranked first and second, but “academic skills” was seventh.[137] Another survey investigated the most frequently spoken words to Japanese students from kindergarten through university. “Cooperation, perseverance, responsibility, effort, sincerity, self-restraint in dealing with others, self-denial or self-discipline, and *sunao* (amenable or docile)” were the eight words most used to children and young people.[138] The fostering of a whole person who has these qualities has been one of the most important aims in education. Based on these beliefs, Japanese education has not focused on the acquisition of ‘knowledge’ and ‘skills’.

In fact, the policy-making of vocational skills training is undertaken separately in Ministry of Health Labour and Welfare. This feature is significant in understanding the relationship and to some extent the separation between ‘education’ and ‘the economy’ in Japan. As argued in the previous chapter, the recent education reform policies and lifelong learning policies hardly address economic ends. This contrasts with the English case. However, this is not to say that there is no link between ‘education’ and ‘the economy’ in Japan. Education has indeed been played a central role in the growth of the country, particularly during modernisation and during a few decades after World War Two. In the 1950s and the 1960s in particular, a large part of the government policies aimed ‘economic growth’, and education was a means to promote it. For example, the “imperative to reorganize both society and education on the basis of a new formulation of ability” was proclaimed in the 1963 Report of the Economic Deliberation Council: “In order to resolve the problem of securing the talents and capacities required to successfully realize the aims of high economic growth, educational planning must be firmly subordinated to these objectives.”[139] Responding to this report, the Central Council for Education began reorganising the education system.[140] Thus, the

educational policies were, at a certain era, very much focused on economic development. Such an economic purpose for education was harshly attacked by both political camps of the left and the right.[141] However, the Japanese approach was not merely to create workers useful for the economy.

As indicated earlier, a common belief in Japanese society was that the role of education was to foster a whole person, and therefore, knowledge and skills, and morality and personality were equally important. It was understood that the qualitative side as well as the utilitarian side of education was responsive to the manpower demands of industries.[142] Therefore, for example, the strict entrance examination system, was and still is, to a certain extent, perceived as "important to character formation". The underlying belief is that: "children cannot achieve maturity unless the growth process from childhood to adulthood is challenging spiritually and emotionally".[143] To achieve self-fulfilment and "individual perfection", particularly during an adolescent period, "concentrated effort, individual work, suffering, attainment, and self-discipline" are significant, and it is often perceived that these can be developed through experiencing entrance examinations.[144] Hence, until *gakureki shakai* [a credential society] became a serious issue, the experience of competition in examinations was considered as an element of 'whole-person education'.

The second aspect which shows the high value of education in Japan is "the respect towards learning", or the appreciation of "learning for the sake of learning". Okamoto explains where such a notion comes from: "The Japanese have a strong affinity towards education, especially school education. . . . It could be said that this 'love of education' is more emotional rather than based on something rational or logical, such as a cost-benefit analysis or goal/means thinking."[145] According to Anderson, it was already an

established perception in the Tokugawa period.[146] Also, Dore puts it: "For more than a century Japanese society as a whole has defined itself as a learning society":[147] one extreme example of which was when, in the 1870s, Japan learned Western technologies, hiring foreign experts.[148] Historically, Japanese people have enjoyed learning for its own sake, finding the learning process itself valuable.[149] Therefore, as is often indicated, Japan welcomed the UNESCO's advocacy of 'lifelong integrated education' straightaway.[150] The conventional values have been taken across to lifelong learning. Lifelong learning – this new concept – had already existed in Japan. This favourable attitude towards learning was generated not only by the diligent nature of the people, but also by their notion of 'learning for the sake of learning'.

There is a saying in Japan that: 'A person who makes an effort will be rewarded [*doryoku suru mono wa mukuwareru*]'. This is the projection of how 'education' and ultimately, 'learning' is seen in Japan. As Dore indicates, a Japanese belief is that acquired ability is more valued than "inner ability".[151] Effort and character are seen as the key element of academic and professional success. If you try hard, discipline yourself and are not selfish, then you can become an intelligent and respected person with a stable job and a happy life.[152] The implication is that people believe in equal ability at birth – everybody has a ticket for success. Therefore, how hard a child tries indicate whether that child can succeed.[153] This mentality can often be seen in education. The University of Tokyo is one of the most prestigious national universities in Japan, and the graduates are regarded as elites. However, the Japanese tend to consider that the students there are special because of the effort involved to enter the university, and the graduates are special because they succeeded after endeavour. The students and graduates of the University are different and separated from those of less prestigious universities not "primarily by genetic endowment, nor by class-based differences in opportunity . . . but by

effort".[154] As Dore points out: "Hard work and perseverance have a value far beyond their instrumental efficacy."[155] Parents and teachers encourage children to make more efforts. It is believed that the more you work hard, the better you become as a person and in your professional life. Effort becomes a quality of the spirit.

Relating to the emphasis on effort, equality is also stressed. The Constitution of Japan declares: "All people shall have the right to receive an equal education correspondent to their ability, as provided for by law."[156] And Equal Opportunity in education is guaranteed in Article Three of the Fundamental Law of Education: "The people shall all be given equal opportunities of receiving education."[157] This is often interpreted as egalitarianism in terms of opportunities: everybody has a right to go to school and is entitled to try any entrance examination. Opportunities for receiving education are open to everybody no matter how old one is and no matter what kind of background one has. It depends on individual efforts whether they succeed or fail – 'spirit' is important.

In parallel, the heavy value placed on education, particularly on primary education, has overshadowed lifelong learning. This can be seen in the separation between 'education reform policy' and 'lifelong learning policy'. If 'lifelong learning' is 'a master concept' as declared in official documents, there should be, as Satou points out, only one collective or whole or coherent 'lifelong learning policy'.[158] One major reason that this could not happen was the established hegemony of the school education.

At the prefectural and municipal levels as well, theoretically, the idea of 'school as a place to foster lifelong learners' is understood, but realistically, a clear divide between 'school' and 'lifelong learning' remains.[159] For example, in Yashio City, the Board of Education does not get involved in the discussion of lifelong learning.[160]

The struggle over the positioning of lifelong learning can also be identified in the Lifelong Learning Promotion Act. To change the inflexible education system which resulted in *gakureki shakai* [a credential society], the Act had a role in bridging the gap between the Fundamental Law of Education – which enforces the top-down administration of school education – and the Law of Social Education – which promotes grass-roots movements.[161] But as is often pointed out, the Act did not define 'lifelong learning'.[162] The lack of a definition was criticised from the beginning of the discussions of the Act in the Diet.[163] There are two mainstream explanations to the reason for not defining 'lifelong learning'. The first is that the government deliberately avoid limiting the scope of lifelong learning, aiming for the large-scale promotion and implementation of lifelong learning with the involvement of other Ministries and Agencies, the private sector and local governments, as Akao points out.[164] Moreover, MEXT officials, Okamoto and Kameoka, indicate that MEXT did not give a fixed definition to 'lifelong learning', encouraging prefectures and municipalities to develop their own versions of 'lifelong learning'.[165] Okamoto even argues that what to include in 'lifelong learning' is totally left to local administrations.[166] These commentaries indicate that autonomous development at the local level was intended in the Act.

The second explanation as to why the Lifelong Learning Act did not define 'lifelong learning' is represented by Ichikawa, who suggests that the government was not at all serious about lifelong learning and a lifelong learning system from the beginning.[167] His argument is based on the evidence that first, no concrete proposal was made at *Rinkyoushin* regarding the budget for lifelong learning, and second, lifelong learning was "discovered" during the later stages of *Rinkyoushin* and attached as a common principle to other reform policies which had already been on the table.[168] Calling the government

proposal of a lifelong learning system "utopian",[169] Ichikawa goes on to argue that an integrated system of informal learning, which includes various providers and funding sources, and formal learning, which is systematic and controlled by the educational administrative laws, is too unrealistic. Moreover, the all-inclusive nature of lifelong learning policy indicates that the control and responsibility of policy-making and implementation should be shared amongst Ministries and Agencies. This in itself is a vast task simply in terms of logistics.[170] However, Sawano points out that the convenience and catchiness of the term 'lifelong learning' was appreciated in the undertaking of the difficult education reform which aimed at the dramatic change to the established school system.[171] Suzuki also indicates that an attractive phrase was needed to unite fragmented policies such as the increase of qualifications or the promotion of support from communities in school education.[172] However, this second party of commentators is sceptical about the government's adoption of lifelong learning policy.

One of the consequences of the fact that the Lifelong Learning Promotion Act did not define 'lifelong learning' has been continuing administrative conflicts particularly with the administration of social education and school education. In terms of social education, officially, its administration was incorporated into the administration of lifelong learning, and the role of social education was clarified: first, to support choosing learning opportunities, second, to provide learning opportunities and third, to offer an accreditation service for learning achievements.[173] However, social education administrators have exhibited both confusion and resistance to the integration of social education into lifelong

learning.[a] The power of the school education administration was so established that the administration of lifelong learning could not get itself involved in school reform policy. In 2001 when the Ministerial structure was reorganised, the Lifelong Learning Bureau was renamed as the Lifelong Learning Policy Bureau but remained parallel to other Bureaus. Moreover, the Lifelong Learning Council became the Lifelong Learning Sub-division, subordinate to the Central Council for Education together with other Sub-divisions.[174] This change defines the weaker administrative authority of the Lifelong Learning Sub-division compared to the Central Council for Education.

Being 'a leading Bureau' but without administrative authority over other Bureaus, the administration of lifelong learning has faced conflicts with the administrative agencies for social education and school education.[175] In building a lifelong learning system, the administration of lifelong learning should be given appropriate overarching authority. Despite that the major aim of 'lifelong learning' has been to ease the rigidity of the education system, administrative conflicts are not helping to solve the educational crisis.

Also, 'lifelong learning' without the official definition has allowed diversification in its interpretation.[176] There are contrasting examples which show completely different interpretations of lifelong learning. The first example comes from Yashio City, a city known for its keenness in promoting lifelong learning. Matsuzawa[b] of the Yashio City

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[a] The difficulty in treating social education as a part of lifelong learning has resulted in a complexity in administrators' posts. Traditionally in social education, social education Managers [*Shakai Kyouiku Shuji*] had had a leading role in providing administrative service to the local communities. Recently, the MEXT has created a new position called "lifelong learning co-ordinators". But each municipality tends to have its own staff who are titled "lifelong learning promoters" or "lifelong learning facilitators" (Itou, 2000, p.27). The posts have been increased without clarifying "who has which role".

[b] The Director of the Planning Department of the Yashio City Council.

Council, points out that lifelong learning is located as an overall policy for the city plan, but there are no 'lifelong learning policies' as such. It is more appropriate to say that 'lifelong learning' is treated as "the theme" of the town rather than its "policy".[177] On the other hand, in Osaka City, Takabayashi[a] of the Osaka City Council, explains that human rights education is the priority in lifelong learning policy in the city. The city also provides a range of learning opportunities, liaising with the private sector.[178] These are only two examples of the practice of lifelong learning at the municipal level, but they illustrate how differently the idea of lifelong learning has been interpreted and developed.

Thus, the answers to the research question, 'how did lifelong learning policy change?', involve both the government's and the people's perception of 'education'. Community building, community bonding and rearing children in a community by the community have been strongly emphasised through the 1990s as lifelong learning policy and education reform policy. Highly valued education based on spiritual principles has influenced lifelong learning policy, making it into a spiritual-focused policy. However, as a result of the structures of educational administration, the administration of lifelong learning has had severe difficulties over the boundaries of policy-making – and thus over the implementation of lifelong learning.

6) Link with the Employment System

There is also an issue in Japanese society that has contributed to the change in education policy and lifelong learning policy: the employment system. This final section argues that the strong link between university degrees – *gakureki* – and the employment system has contributed to the reformulation of lifelong learning policy in Japan. The

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[a] The Planning Section Head of the Lifelong Learning Department of the Osaka City Council.

current government approach to the policy-making of lifelong learning, which does not fully integrate the education system and the employment system, is unlikely to have a drastic effect on altering the nature of society which is *gakureki shakai*.

As discussed earlier, in Japan, both education policy and lifelong learning policy at present do not directly address economic aims. The priority is symbiosis and morality. Such a strategy is believed to be able to tackle the historical problem of the country, *gakureki shakai*. However, the significance of the employment system in *gakureki shakai* has not been probed much, despite a rigid and two-way link between university degrees and business. Firstly, the link functions as a social ladder. As Horio indicates, "first-rank schools" are linked to "first-rank corporations" – major corporations in Japan's industrial society – through the job-placement system.[179] Pempel also notes with the high correlation between educational achievements and subsequent professional success in Japan. A diploma from a prestige university is a prerequisite to enter a prestige company, to move on to a higher position in the company and to obtain financial stability.[180]

Similarly, Wray comments: "Graduation from good secondary institutions not only maximizes student's chances of gaining successful entry into universities, but also fulfills the ultimate goal of obtaining better jobs after graduation."[181] The importance of entering a good upper secondary school and then a good university through competitive entrance examinations, and then of performing well thereafter, has not eased; the perception is that a degree from a good university facilitates getting into a good company, which guarantees a stable and successful life. This perception amongst the school population may well have contributed to the deterioration in school-related problems known as 'the new desolation' of the schools mentioned above. However, this dimension, at least, has

been recognised and, is being tackled through the building of a lifelong learning system.

The other dimension, which correlates *garkueki* with industry, is the means of recruitment of jobs, and this has not been fully debated in Japan. The perception of employers is persistent. A survey in the mid 1990s showed that the majority of companies, with the exception in new industries in science and technology, hired employees "on the basis of the academic standing of the school that they had attended".[182] It could be argued that such a perception is decreasing because of the changing labour market in the period of economic recession. The unemployment rate has dramatically risen, and the employment situation altered. The estimated figure of *"freeters"*[a] – a new form of worker who prefers to have several part-time jobs rather than a stable full-time job – was 1,930,000 in 2002.[183] Therefore, there has been an assumption that the conventional employment system – lifetime employment, a seniority wage system and recruitment of new graduates – has been shifting to a more flexible system with a rise in labour mobility.

However, it is unlikely that such a fundamental change has yet taken place. Historically, the recruitment process of employers, particularly those of large-scale firms, has emphasised university degrees as a central recruitment criterion. This remains the case. Neither "the possibility for any employees to get fired" nor "free re-entering to the labour market without any age discrimination" – the conditions of "the end to the lifetime employment system" – has yet been realised.[184] Particularly in large-scale firms, the employment system is still on a lifetime basis, and graduation from a prestige university is still a central recruitment criterion. Japanese society continues to value the criterion of 'which university' more than 'which achievement'. Hence, the pressure to succeed in

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[a] Those who choose to have a life having a few part-time jobs rather than one job for a living.

entering 'a first-rank university' is still there, resulting in educational problems represented as *kyouiku kouhai* [the desolation of education].

This strong link between university degrees, employers' recruitment patterns, and lifetime employment is an obstacle to the creation of a lifelong learning society, limiting the opportunities for everyone to 'retry' and 're-challenge' in the labour market. If Japanese society truly aims at 'a shift from *gakureki shakai* to a lifelong learning society', not only the reform of the systems, but also people's perception of the correlation between *gakureki* and working life is needed to be changed.

The above sections on Japan have discussed the watershed and change of lifelong learning policy. Japan's watershed was the accumulation of some difficult moments which occurred in the first half of the 1990s in society. The educational crisis termed *kyouiku kouhai* led the Japanese government and the public to realise the urgency of reform. Moreover, the country experienced the collapse of the Bubble Economy, political turmoil and the Hanshin/Awaji Earthquake.

These circumstances triggered the reconstruction of lifelong learning policy which took place throughout the 1990s. However, the characteristics of Japanese society, i.e. lack of experience in civic participation, the high valuation placed on formal education and the link with the employment system, have obstructed the pursuit of what the Japanese government perceives as 'a lifelong learning society'.

The next section inquires into the third research question of this chapter: *What was the strategy for the implementation of the changed lifelong learning policies?*

4. Implementation Strategy

This section suggests that after the watershed, the Japanese government's implementation strategy for their reshaped lifelong learning policy has been the involvement of the public with an emphasis on 'communities'.

In the first half of the 1990s, *kyouiku kouhai* [the desolation of education] was no longer a problem of school only, and the problems of Japanese education came to influence the whole society. The government recognised the need to approach school reform in a different way. The first form of the involvement of the public as the implementation strategy for reshaped lifelong learning policy was undertaken with the establishment of the National Commission on Educational Reform (National Commission) [*Kyouiku Kaikaku Kokumin Kaigi (Kokumin Kaigi)*]. It was set up in 2000 as an advisory committee to the Prime Minister and operated for ten months.[185] The Commission was new in the sense that none of its members was from the government, although some civil servants played an administrative role.[186] The 26 members of the Commission appointed by the Prime Minister included academics, company directors, practitioners, journalists and artists.[187] The task of these "knowledgeable people [*yuushikisha*]" was to search for a future education system which would enable the development of creative human resources for Japan in the twenty-first century, as well as defining a future shape of education which focused not on examinations and degrees, but rather on the encompassing of wider perspectives which emphasised the fundamental principles of education. [188] Another new attempt to involve citizens was 'One-day National Commission on Educational Reform', which was a meeting held in a few cities to invite citizens to express their opinions. Also, the Commission organised explanatory meetings for various organisations and undertook school visits.[189]

The outcome of the Commission was summarised in seventeen proposals in which the importance of the role of communities and families is emphasised. The seventeen proposals are in the areas of: "Fostering Japanese people with a rich sense of humanity"; "Develop the talent of individuals and foster individuals who are rich in creativity"; "Create new schools for the new age"; and a "Basic Promotional Plan for Education and the Fundamental Law of Education". The summary report stressed that these proposals would be "urgently addressed for implementation".[190]

As a result of its involvement with the public, the summary report of the Commission was seen as the outcome of public debates on education rather than proposals imposed by the government. How much of this was intended from the beginning by the government is difficult to descern, but a need to change the process of policy-making was recognised by the government and the public. The National Commission was, in this sense, persuasive. The government was able to present the outcome as the 'people's voice'. In fact, the summary report of the National Commission was moved on straightaway, and the school education reform titled *The Education Reform Plan for the 21st Century [21 Seiki Kyouiku Shinsei Puran]: The Rainbow Plan – The Seven Priorities*[a191] is currently being implemented.

Furthermore, another action taken to promote public involvement can be identified in the recent organisational change within the Lifelong Learning Policy Bureau. The Local

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[a] The Seven Priorities are: 1) Improve students' basic scholastic proficiency 'in easy to understand classes'; 2) Foster youth into becoming open and warm-hearted Japanese through participating in community services and various programs; 3) Improve learning environment to one which is enjoyable and free of worries; 4) Make schools that can be trusted by parents and communities; 5) Train teachers as real 'professionals' of education; 6) Promote the establishment of universities of International standard; 7) Establish an educational philosophy suitable for the new century and improve the provision for education.

Community Policy Unit [*Chiiki Seisaku Shitsu*] was set up within the Bureau to support and link with the administration at the prefectual and municipal levels, aiming to contribute to educational policy-making and to promote community development. The rationale for the establishment of the Unit is to increase the number of people who wish to be involved in community activities and learning in the communities and the demand for regenerating local communities, to enhance empowerment in the community.[192] The Unit is to promote active communities through lifelong learning activities and public involvement in community development.

The second form of the implementation strategy focused on community development is the enactment of the Law to Promote Specified Nonprofit Activities (NPO Law) and the amendment of the Law of Social Education and the Law of School Education. The activities undertaken by NPOs (non-profit organisations) were legislated by the NPO Law in 1998. The Quality-of-Life Policy Bureau in the Cabinet Office [*Naikakufu*] is in charge of the operation of the NPO Law and the promotion of the activities of NPOs, creating appropriate environments for the activities and conducting research of civic activities.[193] The increase of grass-roots interest and awareness and the actual rise in the number of volunteer activities led to the creation of this Law. The Law enables public bodies to obtain the status of corporations more easily than public corporations formerly could. The new corporation status of NPOs is aimed at the citizens' groups which promote free and voluntary activities for the benefit of the society. The activities must fall into one of the twelve categories[a] and should contribute to an increase of the benefits of an

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[a] 12 activities are: health, medicine or welfare; Social Education; community building; culture, art or sports; environment safety and protection; disaster relief; community safety; protection of human rights and peace promotion; international cooperation; creation of the fair society for men and women; fostering healthy children; and support of the previous activities.

unspecific, and large, number of the public.[194] Giving approval socially to a variety of citizens' voluntary activities, the Law enables citizens to participate in social reform – welfare, environment or lifelong learning – as members of NPOs.[195] The Law is a new framework to promote public participation from the legal perspective[196] and to enhance local autonomy.[197] The increase in the number of volunteer groups and NPOs has continued since, and a lot of public interest groups have changed into NPOs. In the year 2000, the number of approved NPOs was over 2000.[198]

Furthermore, on the basis of the National Commission's *The Education Reform Plan for the 21st Century*, the Law of Social Education and the Law of School Education came to be amended in 2001.[199] The purpose of the change was to restructure the Social Education administration for the enhancement of *kyouikuryoku* [the ability to educate] of families and communities. As indicated earlier, according to MEXT, the decline of *kyouikuryoku* within families and communities is one of the background causes of recent problematic behaviour amongst children and young people. Promoting the linkage between schools, families and communities, and increasing *kyouikuryoku* of families and communities is the most important agenda. Features of the change include the Board of Education being given a new administrative role in practising and promoting the course of family education, and enriching the opportunities for children's and young people's volunteer activities, community services, and having some experience of the natural environment.[200] There is an indication that the change in the Laws is to authorise local governments' involvement in family education and volunteer activities of children and young people.[201] Obligatory service activities [*houshi katsudou no gimuka*] in school education were made possible by the revision of these Laws.[202] How the government takes the circumstances of children and young people seriously can be seen in the change to the Laws. With further support and guidance of the education administration,

the empowering of families and the building of bonds in the community is achieved.

These two legislative acts were to promote and support civic activities at school and in the community. Legalisation was an important signifier of the intention to alter the notion of participation. Through these laws, the official approval of public involvement as a means of community development and of national restructuring was registered.

The third way in which public involvement as an implementation strategy was achieved was publication. Consecutive Reports issued by the Lifelong Learning Council and the Central Council for Education are part of the government's action to advocate community-focused lifelong learning policy. As illustrated earlier, it was not until 1996 that the Lifelong Learning Council issued its second Report, but it was followed by another four Reports during the rest of the 1990s. The second Report, *Measures to Enrich Lifelong Learning Opportunities in the Local Communities* [*Chiiki ni Okeru Shougai Gakushuu Kikai no Juujitsu Housaku ni Tsuite*][203] concentrates on the building of a learning community with firm partnerships. The idea of '*gakusha yuugou* [the fusion of school and the society]' is introduced[204] to enable a variety of learning opportunities which disturb conventional boundaries between family learning, school education, community development, higher education and workplace learning.[205] *Gakusha yuugou* seeks to unite the local community and to give life to interactions between different age groups and different institutions. Local children and young people will be exposed to a wider social life and richer experiences.

The third Report, issued in 1998, was entitled *Measures to Shape Future Social Education in Response to the Change of the Society* [*Shakai no Henka ni Taioushita Kongo no Shakai Kyouiku Gyousei no Arikata ni Tsuite*][206] in which community building in

relation to social education is discussed. Networking all partners in a community is emphasised, and '*nettowaaku gata gyousei* [a network model of administration]', which is to promote collaborative working between the local education administration, the Board of Education, local citizens' organisations and local education institutions, are proposed.[207] With the involvement of a local population in the education administration, it is argued all members of the community can be brought together.[208] Overall, then, as a response to *shakai kouhai* [the desolation of society], the strategy taken by the Lifelong Learning Council has been to build firm networks in communities.

The government also sees "evaluating learning achievements"[209] as an important part of a lifelong learning society. In the following year, the fourth Report, *Measures to Make the Most of Achievements for Lifelong Learning* [*Shougai Gakushuu no Seika o Ikasu Tame no Housaku ni Tsuite*][210] was issued. The uses of learning outcomes to contribute to the enhancement of a creative and affluent society are discussed. The three prioritised areas in which to use learning outcomes are first, individual career development which includes social activities as well as professional experience; second, volunteer activities; and third, *machizukuri* [local community building]. Moreover, to make the system of learning achievements compatible, the creation of a "Lifelong Learning Passport" is proposed. It is a record of achievement which identifies and recognises the result of any kind of learning activities, both formal and informal.[211] The government claims that, because learning takes place anytime and anywhere in anyone's life, flexible measures for evaluation are necessary. The Report reemphasises the positive role of community and volunteer activities and encourages learners to bring their learning results back into their local community. The argument of the government is that in a lifelong learning system where 'input' – learning opportunities – has variations, 'output' – evaluation – should be flexible and diverse. For both perspectives, voluntary participation is

emphasised.

There was another Report that came out in the same year, 1999. *Measures to Foster 'Zest for Living [ikiru chikara][a]' in Children* [*Seishounen no 'Ikiru Chikara' o Hagukumu Chiiki Shakai no Kankyou no Juujitsu Housaku ni Tsuite*][212] concentrated on the role of a local community in rearing local children. It argued that expanding more opportunities for children in the community to gain different experiences, constructing more places where children can play in the community, establishing an infrastructure to promote children's experiences and activities in the community, should all be undertaken. To achieve such initiatives, collaborative partnerships between schools, parents, local governments and the private sector are stressed.[213] Thus local communities can and should contribute to the improvement of schools and the fostering of local children. Lifelong learning policy has increasingly come to address school issues.

Another means to implement lifelong learning is discussed in the most recent Report, *Measures to Promote Lifelong Learning Using New Information Communication Technology* [*Atarashii Jouhou Tsuushin Gijutsu o Katsuyoushita Shougai Gakushuu no Suishin Housaku ni Tsuite*].[214] Information communication technology (ICT), which has brought a rapid and dramatic change to socio-economic structures globally, permit "a communication network society" in which all learners can access the Internet, and receive and send diverse and global information.[215] The government's emphasis is that this new environment will not only increase learning opportunities, but also enable

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[a] According to the Ministry's Secretariat of the Lifelong Learning Policy Bureau, Terawaki, *'ikiru chikara'* refers to: first, having one's own opinions; second, having the ability to be able to convey one's own opinions; and third, having the ability to work with others accepting differences and conflicts (2002).

anybody to learn whenever and wherever.

These four Reports of the Lifelong Learning Council focused on 'communities', in which the promotion and implementation of lifelong learning in the communities by the communities are encouraged. The government's argument is that with a collaborative relationship between schools, families, employers, voluntary organisations and local governments, both individual and community needs can be met. 'Community building' and 'lifelong learning' have become inseparable.

There has been something on education reform of a rush of publications in recent years. After *The Model for Japanese Education in the Perspective of 21st Century*, which introduced *ikiru chikara*, the Central Council for Education produced many Reports during the second half of the 1990s. *To Cultivate a Sound Mind for the New Era* [*Atarashii Jidai o Hiraku Kokoro o Sodateru Tame ni*][216] was issued in 1998, in which it was argued that Japan is 'facing a crisis' because of the decline of morality. People of the present society tend to prioritise their own benefits, neglecting caring about others; they lack responsibility and value material and pleasure; they neglect any effort to improve society; and emphasise convenience and effectiveness. What was new in the Report was the emphasis on the idea that it was adults who created a society of 'low morals' and they were responsible for reforming society. 'Education of the mind [*kokoro no kyouiku*]' has to be undertaken with the understanding and involvement of every part of society so that traditional Japanese values such as diligence, sincerity and respect towards nature, and fine culture are passed on to the next generation.[217] The government strategy to tackle problems of children by involving all possible members of society can be identified. Another feature about the Report is the emphasis on morality – a continuing theme in the later documents.

General Education in the New Age [*Atarashii Jidai ni Okeru Kyouyou Kyouiku no Arikata ni Tsuite*] [218] issued in 2002 identifies the impending crisis in the country and emphasises the importance of a general education which refers to Japanese culture and tradition. The Report describes the difficult tensions that Japanese society is facing: neither individuals nor society as a whole perceive that the country became richer despite convenient life-styles and materialistic fulfilment; society is becoming fragmented, not sharing common aims and objectives, and human relationships are becoming shallower; values of learning became uncertain. Overall, both individuals and society are no longer confident about the future of the country. These tendencies are threatening the vitality of the country. It is argued that general education is "the invisible basis of the society" which enables self-improvement, enhances mutual understandings and makes members of society aware of their responsibilities and obligations.[219]

In these Reports created by the Lifelong Learning Council and the Central Council for Education, an emphasis on morals, unity of society, Japanese values and civic awareness have been central themes. The aim of the government has been a moral appeal. 'Communities' have become a common ground for both the development of lifelong learning and the ongoing education reform. This new strategy has been stipulated through government Reports.

This section has suggested that the Japanese government undertook actions based on a clear implementation strategy: involving the public with an emphasis on 'communities'. More precisely, the actions were the establishment of the National Commission and the Local Community Policy Unit within MEXT, the enactment of the NPO Law and the alteration of the School Education Law and the Social Education Law, and the five

publications of the Lifelong Learning Council and two publications of the Central Council for Education. Addressing 'communities' from various angles, all these actions aimed at the quick implementation of the reshaped lifelong learning policy.

5. Summary

To summarise this chapter, three research questions have been used;

When and what was the watershed in the development of lifelong learning policies in Japan?

How did lifelong learning policies change?

What was the strategy for the implementation of the changed policies?

The watershed in Japan occurred in the first half of the 1990s and was a mixture of major events and continuing patterns in society, which this study called *shakai kouhai* [the desolation of society]. First, the problems in education – e.g. 'classroom disruption [*gakkyuu houkai*]' – were getting worse, although 'a shift from *gakureki shakai* [a credential society] to a lifelong learning system' had been proclaimed. Moreover, the turmoil in Japanese politics and the economy, and a large-scale earthquake brought catastrophic circumstances to the country. It was acknowledged that the country was facing its most critical period since World War Two.

Struggling to cope with the situation, the government came to address community building as the main part of lifelong learning policy. The education reform policies formulated at the Central Council for Education and the National Commission and the subsequent implementation of prioritised initiatives came to stress the spiritual and the moral – *ikiru chikara*, volunteering, traditional values – in tackling the educational crisis. At the same time, 'families' and 'communities' were treated as important partners of 'schools' to foster, in children and young people, morality and values. Also, the Lifelong

Learning Council came to emphasise the collaboration of schools, families and communities. New approaches such as 'the fusion of school and society' and 'a network model of administration' were brought in to encourage local people's participation in community activities to strengthen bonds within a community. 'A lifelong learning society' was repositioned as a society in which people are voluntarily involved in raising children, have high awareness of the need to improve society, and different generations and institutions are interactive. A country that had lost its confidence and a future vision needed something new and dramatic.

These policies have been implemented, with a resultant increase in civic awareness and participation.[a] The aspiration of the government and the public has been that with lifelong learning, Japanese society would change into a 'civil society'. However, particular features of Japanese society have acted as a barrier against the construction of a lifelong learning system and the realisation of a civil society. The understanding of civic participation and the pursuance of the public benefits are restricted. The emphasis on a particular way of 'valuing education' has caused conflicts, bringing difficulty in the administration of the lifelong learning administration. The emphasis on university degrees has survived, largely because of continuing cultural assumptions and hiring practices of employers.

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[a] It is noted that there are other large-scale initiatives such as the University of the Air [*Housou Daigaku*] and the Project of Improving Career for Working Adults [*Shakaijin Kyariaappu Jigyou*], and in fact, the largest portion of the budget of lifelong learning policy is allocated to the University of the Air (MEXT, *Manabee*, 2001, p.4) founded in 1967 by MESSC. The University has been reemphasised as an important initiative of promoting lifelong learning. A university education that is open to everyone via radio and television was suited to the idea of lifelong learning. The number of the enrolment of the University was increased during the 1990s (2003, http://www.u-air.ac.jp/). But the University has been running since the 1960s, and it would have existed even without the development of lifelong learning policy. Therefore, it is not appropriate to juxtapose the University of the Air and other lifelong learning initiatives. In this sense, this section has suggested that the majority of the current policies are related to children and communities.

The government's particular implementation strategy was the emphasis on 'communities'. More and more addressing school education reform, lifelong learning has come to emphasise morals and bonding. First, a new form of policy-making involving academics, practitioners and businesses was carried out through the National Commission, which came up with concrete proposals for education reform. The organisational structure of MEXT was altered to create a path between citizens and the lifelong learning administration. Second, the government's clear intention – to promote public involvement – can be seen in the enactment of the NPO Law and the amendment of the Law of Social Education and the Law of School Education. The government has also used public persuasion, in the form of the production of Reports. Both for lifelong learning and school education, there was a stream of publications, all of which referred to the need for citizens to contribute to changing the country.

As was seen in the English implementation strategy of a reformulated lifelong learning policy, as well as in Japan, the scale of actions and the government's determination were greater than the previous strategy. The Japanese strategy which was undertaken shortly after the formulation of lifelong learning policy concentrated on the setting up of the infrastructure of a lifelong learning system, e.g. the establishment of the Lifelong Learning Council. But this time around, there was a more specific agenda – the emphasis on communities – which was seen as a means to reconstruct the whole of society as well as to reform the education system.

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CONCLUSION TO PART TWO: LOCAL POLICY CHANGE

Part Two has described and analysed the formulation and reformulation of lifelong learning policies in England and Japan.

The pattern of the formulation processes of major lifelong learning policy in the two countries was similar. The policy was a product of major domestic economic difficulties, a concern with a long-lasting problem of the country, new political energy, major new institutions and players – and a slow and complex series of policy clarifications as the vision became practical. However, the timings and the contents of these policy processes varied between England and Japan, and this variation resulted in different lifelong learning policies, which then led to the divergent foci of the implementation strategies of the policies.

This analysis leads to the conclusion that the differences between English and Japanese lifelong learning policies do seem to reflect the different processes of the formulation of the policies. The original attraction on lifelong learning policy was to overcome a long-standing problem of society – in England, skills shortage which addressed economic deficit and in Japan, *gakureki shakai* [a credential society] which addressed societal strain. These themes seem to be constant, and in fact, currently, English lifelong learning policy is strongly linked with the economy, and Japanese lifelong learning policy is focused on improving society. The policies in both countries, therefore, have remained unchanged since the formulation of the policies. Or have they?

The proposition of this study is 'they have not'.

After the process of initial formulation and as the policies moved into practice, in both countries there was a watershed which prompted change in their lifelong learning policies. The processes of their reformulation differed because the watershed in Japan was more complex than that of England. As a consequence, the Japanese government dramatically shifted its focus on the implementation strategy of the updated policy; whereas the UK government consolidated its original priorities.

This analysis of the formulation and reformulation processes can now be expanded comparatively, focusing on the differences between the two societies.

Firstly, what is considered valuable as 'education', which has been projected onto the interpretation of lifelong learning in England and Japan, has been determined in each case by the deep-rooted themes in the history of each country.

These themes are, in England the persistence of social class, and in Japan the penchant for spiritual principles. The problems are so rigid that both countries are struggling to achieve the kind of 'social reform' that they say they want.

In England, there has been a division in education reflecting class structures at least since the nineteenth century. For the upper and middle classes, liberal education has marked by the examples of universities such as Oxford and Cambridge. This form of education has shaped the ruling elites: "the major professions or leadership in the church, armed forces, civil service or colonial administration".[1] These upper and middle class populations controlled "the machinery of state" throughout the nineteenth century and into the twentieth century.[2]

At the end of the nineteenth century, there was an emergence of counter-tradition, which was vocational and technical education and training for the skilled working class: the skilling of a workforce for the "new science-based industries"[3] was required. Indeed, the establishment of an education system for scientific and technical skills development was urgent. 'Education' became linked to the economic development of the country; and the acquisition of skills to improve economic competitiveness and performance was emphasised. Technical colleges – initially in the form of mechanics' institutes – were founded in urban areas, targeting working class populations.[4]

Despite these efforts to widen educational opportunities, in 1921 only 3.2 percent of the 16 to 18 year olds were at school.[5] In 1944, a drastic change expanded the class base of secondary education. The Butler Education Act was enacted to raise the school leaving age to 15 and to implement universal secondary education. However, the take-up of secondary education beyond compulsory education remained limited. In 1961, only about five percent of boys and three percent of girls continued education after the age of 16.[6] 'Social class' was still strongly related to parents' occupations.[7]

During the 1960s, the Labour government continued education reform on the principle of 'equality of opportunity', trying to abolish grammar schools and to introduce comprehensive schools.[8] Polytechnics were founded to create opportunities for the working class to enter into higher education. However, an ironic consequence was the clear division between "the academic universities" and "the vocationally oriented polytechnics".[9] Class-based education and class-based occupations therefore persisted

in English society.[10]

As discussed in Chapter Three, when Thatcher came to power, there was difficulty in maintaining a welfare state and in coping with globalisation and European integration. The political solution of the Thatcher government was to develop a neo-liberal philosophy. The Thatcher governments had to deal with the worst unemployment circumstances in Britain since the 1930s.[11] Hence, lifelong learning policy edged toward vocational training policy mainly for the unemployed and the working class. However, Thatcher's neo-liberal reform such as greater parental choice brought in with the 1988 Education Reform Act did not narrow the gap between the upper and middle classes and the working class in terms of educational access and attainment.[12]

The neo-liberal approach has been taken over by New Labour, which has undertaken social reform with a dual commitment – stressing in inclusion as well as market principles. One of their major aims in education is to provide the disadvantaged population, i.e. the working class, with an opportunity to skill and upskill. In this light, what the UK government means by 'inclusion' is largely economic inclusion, which they perceive as part of the solution to the long-lasting problem of class in society.

The Labour government's inclusion policies have created "a break down of *some* of the stark and obvious class divisions of the past in post-16 education and employment".[13] Yet, "some of these divisions obstinately remain and there is the emergence of a more fuzzy, more complex hierarchy with new markers of differentiation".[14] In Coffield's terms, "new inequalities" have developed.[15] Creating opportunities has not necessarily

addressed the source of non-participation: the class division.

In contrast, in Japan, one of the cultural characteristics has been the penchant for spiritual principles. Equality, solidarity and morality are valued, and problems are solved by changing people's "attitude" rather than the "system".[16] As Chapter Six indicated, education has been treated as 'lofty' and 'sacred' in Japan. The emphasis on 'whole-person education'[a] is another example of this stance. Fostering harmony, morality and attitude have been the central aim of education while the development of skills and knowledge has been considered as training, as distinct from education.[17]

These principles stem from social values and beliefs developed long before the modernisation era in the nineteenth century.[18] In the late Tokugawa period, *kokugaku* [national learning] was a political philosophy consisting of first, "the Shinto concept of imperial divinity" which was a central component of the strict feudal system, second, the Confucian code of loyalty, frugality and filial piety and third, "the Confucian ethic" of personal behaviour and social discipline which was a variant of Chinese Confucianism.[19] Society was hierarchically organised based on a strict stratification of classes,[20] and solidarity and morality were highly valued. In the field of education, Confucianism functioned as "a completely secular instruction in literature, ethics, and history or political science in the present sense of these words".[21] There was no standardised education 'system', but teaching and learning which aimed at character building as well as reading, writing and arithmetic were widespread. One example that illustrates the zeal for education in Japan is that, in 1853 when Admiral Perry arrived, 40 percent of the boys and 15 percent of the girls of primary education age were in education. These figures

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[a] See 5) The High Valuation of Education, Chapter Six.

were as high as Western countries.[22]

When Japan undertook national reconstruction after the 1868 Meiji Restoration, education emphasised skills and knowledge which would lead to economic growth. During the Meiji Era, the country was eager to learn from the West. However, as the phrase "Western technology and Eastern spirit"[23] shows, Japanese spiritual principles based on Shintoism and Confucianism still endured. After World War Two, as already indicated, 'whole-person education' was re-emphasised, although the country knew from previous experience that the development of human capital was crucial in rebuilding the nation.[a24]

The spiritual principles of solidarity, morality and attitude, and highly valued education have had significance for Japanese lifelong learning policy. When the country faced 'the desolation of society' in the 1990s, the fundamental understanding of 'education' as something to foster a 'whole person' who respects harmony and morality redirected the emphasis of lifelong learning towards ideas of bonding and caring in society. It can be seen that the notion of 'inclusion' in Japan refers to community solidarity.

In the current education reform, spiritual emphases became even stronger, demanding,

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[a] There were significant commonalities between these two national reconstruction projects of 1868 and 1945 which emphasised education. First, the focus of education reform was particularly on primary education. Japanese leaders chose a 'bottom-up' strategy to educate the whole population for the sake of future national advancement; although the provision of selective higher education to produce elites would have been a quick fix. Second, equal access to primary education was emphasised. There was no exclusion based on gender or class. As a result, the school attendance rate of 12-year olds at the beginning of the twentieth century was 99 percent. In both occasions when Japan faced dramatic change, primary education based on equal access played a central role in social reconstruction (Beasley, 1995).

according to Okamoto, "education of *kokoro* [heart]".[a] As indicated in Chapter Six, the Japanese education system is in a state of partial collapse, and the number of young people's crimes is increasing: therefore "re-education" emphasising *kokoro* has become necessary.[25] It is easy to list examples of spiritual principles [*seishin shugi*] in Japanese education policies: '*kokoro no kyouiku* [education of the mind]', '*ikiru chikara* [zest for living]', '*yutori* [room to grow]' and '*kyouikuryoku* [the ability to educate]'. A solution to problems of, for example, bullying or delinquency is often based on abstract or rhetorical concepts such as *kokoro no kyouiku* or *yutori*.[26]

A spiritual approach can also be identified in lifelong learning policies. As a MEXT official, Terawaki, clearly puts it: the administration of lifelong learning can be termed as "administration for the fulfilment of life [*ikigai gyousei*]".[27] The implication here is that the participation in lifelong learning and its promotion will contribute to everybody's happiness, even though working out how to administer this is difficult. In practice, lifelong learning policies have addressed abstract ideas such as '*gakusha yuugou* [the fusion of school and the society]' and '*kyousei* [symbiosis]' rather than specifying visible targets.

Secondly, approaches to public responsibility have been led by these educational values in England and Japan.

The UK government is keen on the pursuing of public responsibility with measurable achievements. The emphasis on an audit locates expected economic contribution as a

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[a] Literally '*kokoro*' means 'heart', but Okamoto indicates that the term connotes "mind, soul, spirit, attitude, value system and humanity".

priority. The government has an obsession with 'delivery', though creating a range of targets. Skills and knowledge are made measurable with targets following the method of policy evaluation – Public Service Agreements – which is undertaken by the Treasury.

The Japanese government has taken an approach which relies on citizens' awareness and attitudes. Because of the appreciation of spiritual principles, collaboration and bonding became an end, not a means, and the public 'good' of lifelong learning rests in its civic contribution to society. MEXT has recently started to carry out a policy evaluation;[28] however, the notion of measurement, the clarification of accountability and the provision of 'value for money' have not yet been fully introduced. The difficulty lies in precisely evaluating spiritual targets: for example, the evaluation of whether or not a pupil has gained *ikiru chikara*, or to what extent a school has been successful in providing *kokoro no kyouiku* is too abstract to be quantifiable. The spiritual emphasis on 'goodness' and the appropriateness of it as an education policy is open to question.

Thus, within domestic contexts, the perception of 'education' has largely contributed to the shaping and reshaping of lifelong learning policies. Historical concerns have directed the prioritising of economic and social concerns respectively, but with a twist in both countries. The English lifelong learning policy cannot neglect measurable targets due to the economic emphasis in and audit motif of public policy, and the Japanese lifelong learning policy concentrates on the addressing of spiritual and moral aspirations – with little discussion of what 'public' policy means.

So far, this study has looked at the English and the Japanese processes the way in which lifelong learning policy was evolved and how the policy has changed its shape over time. The reshaping of the policy is continuing at this moment and will continue in the future. In

parallel with the reshaping, particular strategies for implementation are undertaken and will also continue. This study now returns to the international discourse of lifelong learning and discusses how the discourse is significant to English and Japanese lifelong learning policies.

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PART THREE THE INTERNATIONAL-LOCAL RELATIONSHIP

The previous part has explored the two different trajectories of lifelong learning policies in England and Japan.

In the English case, dealing with a skills crisis through a social inclusion policy has become a component of lifelong learning policy. New Labour's concern for the disadvantaged population is concrete, but its inclusion policy is strongly connected to economic ends. In contrast, in the Japanese case, community building has become the central aim of lifelong learning policy. The Japanese government, emphasising public participation, has aimed to reenergise society, which faced extremely difficult years, partly through the implementation of lifelong learning policy.

In addition to these specific local contexts and social and political processes, the international context has also played a part in reshaping lifelong learning policies in the two countries. This is the theme of Part Three.

CHAPTER SEVEN LEGITIMACY, ADAPTABILITY AND TRANSLATIONS

1. Introduction

This chapter asks:

What is the relationship between the international discourse of lifelong learning and domestic lifelong learning policies in England and Japan?

This chapter suggests that a similar discourse to that of the international discourse on lifelong learning has been adopted as an official discourse in England and Japan. Lifelong learning has been given legitimacy by the 'global change' and 'social justice' arguments discussed earlier; national governments have appropriated that discourse.

In England, the current Labour government offers similar arguments to those found in the international discussions of lifelong learning. The government has referred to economic, cultural, technological and demographic changes and inclusion, equity and regeneration quite often in policy documents. Similar themes can also be identified in the public debates on lifelong learning in Japan. The Japanese government too recognises the impact of global changes on domestic economic and social contexts.

The chapter also suggests that both the UK and the Japanese governments position lifelong learning as a central policy for social reform; however, the adaptability of lifelong learning permits the projection of different reform policies onto lifelong learning policy.

In England, it is suggested that the UK government's current revision of lifelong learning, addresses what Edwards calls "advanced liberalism".[1] In Japan, it is suggested that the Japanese government's new version of lifelong learning addresses what this study calls 'quasi-communitarianism'.

To explore these ideas, the chapter is structured as follows: the second section revisits the characteristics of 'the international discourse'. The third section notes the overlap between the international discussions of lifelong learning and the debates about lifelong learning in England and Japan. This is followed by an analysis of the shifts in domestic interpretations of lifelong learning. The fifth section summarises the chapter.

2. Revisiting the International Discourse

Chapter Two identified two distinctive characteristics of the current international discussions of lifelong learning. The first was the argument that lifelong learning had been necessitated by 'global change', which includes economic, socio-cultural, technological and demographic changes. Second, the chapter noted that lifelong learning was seen as a source of 'social justice' through the establishment of 'lifewide' learning 'for all'.

It has been suggested that the international discussions of lifelong learning which address these features have become a discursive norm. On the basis of these 'global change' and 'social justice' arguments, lifelong learning is treated as 'a universal solution' to cope with a wide range of problems in the world. Thus, as Edwards argues, the themes of economic, cultural, technological and demographic changes have been "bound together by, among others, governments, policy-makers, the media, educators and trainers to produce *a powerful discourse* [emphasis added]"[2] which provides "a particular discourse of change which supports an interest in lifelong learning".[3]

The point may be put in another way: lifelong learning is 'powerful' because it has been legitimated. Lifelong learning has been interpreted as beneficial: it brings numerous

benefits, such as enabling individuals, businesses and states to cope with the global economy or widening the opportunities of the disadvantaged population. In short, lifelong learning has been legitimated politically as both 'necessary' and 'good'.

Furthermore, the claims about the numerous benefits of lifelong learning indicate the exceptional adaptability of the concept. This 'exceptional adaptability' is what Okamoto refers to as the "multi-dimensional"[4] feature of lifelong learning. In Kraus' words, lifelong learning is "context-adaptive". [5] Hence, lifelong learning takes on ideological characteristics: its exceptional adaptability permits its adoption as a policy concept; while the practices undertaken in its name may vary.

This ideological dimension of lifelong learning permits the international discourse characterised by the 'global change' and 'social justice' arguments to overlap comfortably with the lifelong learning discourses of England and Japan: the same relatively simple arguments about necessity and benefit can be offered in both domestic contexts – to justify different policies.

3. Constructing Legitimacy in England

In the Labour government's fundamental policy document, *The Learning Age*, the importance and impact of 'global change' is emphasised. The Green Paper starts by indicating: "We are in a new age - the age of information and of global competition."[6] 'The new age' has to face changes in industrial structures and types of jobs, and the advancement of new technologies. It is noted that there have already been significant changes such as the fall of employment in manufacturing, and an increase in the numbers of the self-employed, part-time workers and the female workforce. However: "As we move into the new century, skills and learning must become the key determinants

of the economic prosperity and social cohesion of our country. Knowledge and skills are now the key drivers of innovation and change."[7] There is "no choice but to prepare for this new age".[8] The government's emphasis is that the change which the country is facing is 'new'; global; an unavoidable necessity – and the only means to live with the change is through 'continuous learning'.

The 'social justice' argument is also deployed in England. *The Learning Age* emphasises that learning throughout life should be for all to build "a well-educated, well-equipped and adaptable labour force".[9] It is acknowledged, however, that there are obstacles which prevent people from starting or carrying on learning: for example, "time, cost, fear, inadequate information, complexity and inconvenience", and also, quite a few people believe learning is "not for them".[10] These obstacles have to be overcome through "the development of a culture of learning" which will build "a united society", support personal independence and cultivate creativity and innovation.[11] "A new learning culture", i.e. "a culture of lifelong learning for all",[12] has become a key policy slogan. It is justified by the proposition that: "everyone can share in the benefits of learning enabling people to discover new talents, stretching their creativity and widening their opportunities".[13] Encouraging and motivating 'non-learners' is a motif: "For anyone, at any stage in their life, learning can be fun."[14]

The legitimation offered by the government is that learning is beneficial to everybody at all times in their lives. As a consequence, 'learning' should become lifewide. The Labour government stresses that the modes of learning should range from formal degree courses to leisure activities[15] and that different learning environments and styles, e.g. taking an evening class or at work, should be encouraged.[16] The public philosophy is inclusive: "Lifelong learning is for everyone, of all ages and backgrounds – we are all

learners and educators."[17]

Some other discursive links between the public position of the UK government and the publications of international organisations can be identified. For example, the findings of OECD's research and surveys are published. The UK government, quoting one of the OECD's analyses, acknowledges that "there was too big a gap between high and low attainers in the UK and that socio-economic background remained a barrier to educational success".[18] The OECD's findings are used as part of the persuasion: over 70 percent of young people under 21 from the highest socio-economic group go to university in contrast to 20 percent from the lower socio-economic groups. The UK government builds the case by arguing: "This has to be overcome in our national interest: social justice and economic success mean we must do all we can to remove the notorious long tail of under-performance that mars our record in education."[19] Evidence for 'the learning divide' provided by the OECD was brought explicitly into the discourse by the UK government.

In *Initial UK Response to EC Memorandum on Lifelong Learning*, the UK government also publicly embraces the EC's principles on lifelong learning. Quoting the EC, the UK government explicitly states that: "we are [*sic*] would agree with the statement in the Memorandum 'that education and training throughout life helps to maintain economic competitiveness and employability'".[20] Also, the UK government agrees with the EC that lifelong learning is a means to combat social exclusion, although with a stronger emphasis on the development of skilled workforces.[21] As a response to the six key objectives presented in the EC Memorandum, the UK government introduces its concrete measures to achieve those objectives. For example, one of the EC's objectives, "valuing learning" aims to "significantly improve the ways in which learning participation and

outcomes are understood and validated, particularly non-formal and informal learning".[22] The UK government's approach to this particular objective is "developing innovative ways of valuing and appreciating all forms of learning . . . to support lifelong learning and mobility", focusing on establishing a coherent national qualifications framework.[23] As can be seen, the UK government is – in these publications – operationalising the EC's approach in developing lifelong learning policy.

The UK government has remained comfortably close to the discourse of the international organisations, particularly that of the OECD and the EC,[24] and has used the twin arguments of 'global change' and 'social justice' to justify the need for lifelong learning.

4. Constructing Legitimacy in Japan

The Japanese government has justified in broad terms the importance of lifelong learning in a new era: "In order to create an enriching and dynamic society in the twenty-first century, it is vital to form a lifelong learning society in which people can freely choose learning opportunities at any time during their lives and in which proper recognition is accorded to those learning achievements."[25] This approach has been stressed in the Lifelong Learning Council Reports and the White Papers on Education.

More specifically, in public discourse, the relation between 'global change' and lifelong learning is acknowledged in these official documents: "along with globalization, development of the information society, and the change in industrial structures, members of society are being compelled to constantly acquire new knowledge and skills, also creating demand for lifelong learning".[26] The 'global change' argument has been used to legitimise the adoption of lifelong learning in undertaking a major national project – the reform of economic, administrative and educational systems – which is described as

being as large as the Meiji Restoration or the reform after the end of World War Two.[27]

The 'social justice' argument is also deployed. On this ground, it is stated that in a lifelong learning society, "people can freely choose learning opportunities at any time during their lives" and "proper recognition is accorded to those learning achievements".[28] A lifelong learning society is a one in which a lifestyle of learning is established, latent learning needs can be found and met, and all educational institutions work together to respond to the various learning needs in the workplace, community and society.[29]

Thus the key strategy, in terms of the social justice agenda, is the creation of "diverse learning opportunities",[30] ranging from intentional and structured learning activities at school to sports activities, cultural and recreational activities and volunteer activities, which take place in all sorts of settings, e.g. higher education institutions, schools, *Kouminkan*,[a] libraries, museums, cultural facilities, sports facilities, Culture Centres,[b] firms and offices.[31] Recently, the use of ICT, which not only increases learning opportunities, but also enables people to learn whenever and wherever, has been keenly discussed.[32] The proposals for school reform have also argued that conventional formal institutions should be transformed into more flexible schooling.[33] The principle of 'lifelong, lifewide learning for all' is widely understood and supported by organisations, local civil servants[34] and academics.[35]

During the 1990s, the direct influence of the international agencies was strong and measurable. Sawano points out how international agencies urged the Japanese

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[a] *Kouminkan* is a public community centre run by the social education administration.
[b] Culture Centre is a private educational institution which offers a range of courses.

government to promote and develop lifelong learning more in the second half of the 1990s.[36] After the Cologne Summit of 1999,[37] the Summit held in Okinawa in the following year emphasised the educational agenda again, and the use of ICT in education. In the White Paper on Education issued in 2000 – and with an explicit reference to the Cologne Charter and these agendas discussed at the Summits – the Japanese government stressed the "decisive importance in the transition from a traditional manufacturing-based society to an information society . . . and [an] internationalized society".[38] The White Paper also noted that: "education policies which have until now been considered as purely matters of domestic concern, have come to be discussed in an international environment. It is now important that future education policies be advanced based on an international viewpoint".[39] Also, in the same year, the Lifelong Learning Council issued a Report on the use of ICT in promoting lifelong learning.[40] It can be suggested that the Japanese government – in these particular ways – has been responsive to international discussions on lifelong learning.

To summarise, both in England and Japan, political debates on lifelong learning have echoed, and in particular examples repeated, the two major themes of lifelong learning: 'global change' and 'social justice'. The propositions, as justifications for the adoption of lifelong learning as education policy, can be found in official discourses in the two countries; and both countries in their public documentation have recognised explicitly the significance of the international discourse.

Nevertheless, lifelong learning policies in the two countries diverge. There is one particular characteristic of lifelong learning that enables the UK and the Japanese governments to adapt the idea according by their purposes. This is the topic of the next section.

5. Adaptability and Reform

1) The Different Degrees of Neo-liberalism

During the 1980s, many developed countries, including England and Japan, tried to deconstruct the welfare state.[41] Both the Thatcher government and the Nakasone government linked lifelong learning to neo-liberal principles. As Griffin puts it: "the *learning* focus of lifelong learning should be understood more in terms of the *withdrawal* of the state from public policy-making as part of a strategy to reform the welfare state. . . . learning eludes social policy because it cannot, like educational provision, be directly controlled".[42] This was exactly what the Japanese government did – renaming lifelong education as 'lifelong learning'. What drove "education out and learning in"[43] was the changing role of the state in the context of the global changes discussed in Chapter Two. Lifelong learning was seen as a "grand narrative of social welfare reform", which was identified as "not only post-industrial or postmodern but post-welfare".[44]

Hence, a shift to "free-market economies"[a] was "not only an economic but a social revolution".[45] With the construction of citizens as 'social actors', lifelong learning became

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[a] It should be emphasised that the neo-liberal understanding of 'markets' in the field of education is not necessarily consistent. As Griffin points out, 'a market' in the case of welfare services is not exactly the same as "an economic market in the *laissez-faire* sense" where "choices are assumed to be made on the most rational possible basis, on the fullest possible information" and where "mistakes made in market choices cannot be retrieved". 'Markets' in welfare services are rather *"quasi-market"* since "governments curb markets with consumer protection, which is an object of *policy*": e.g. "in the form of quality assurance, public standards, transparency" (1999, pp.440-441). Tooley, on the other hand, points out that market principles in the field of education are unreasonably criticised. However, it is not 'markets', but the government intervention in education that educational policy debates should be more critical of. "The still heavily interventionist state system" is imposing "the dogma of the market" on everyone including those who do not wish to learn. Markets can be a solution to educational problems and have a potential to let "the enterprise of education" grow (1996, pp.110-111). These commentaries on 'markets' may vary, but the idea has been a major component of neo-liberalism and the significance of market principles have been proclaimed by governments.

an important component of the social revolution in neo-liberal politics.

Despite this consistency in the treatment of lifelong learning, neo-liberalism varied in its impact in England and Japan. The Thatcher government was determined to put neo-liberal policies into practice. The Nakasone government, on the other hand, could not implement many of its neo-liberal policies, though neo-liberalism survived in its political rhetoric. This comparative point can be illustrated, by examination of first, the English case.

In England, neo-liberal principles were clear from the beginning of the first Thatcher administration. Gamble indicates that:

> As a political project, Thatcherism had three overriding objectives – to restore political future of the Conservative Party, to revive market liberalism as the dominant public philosophy and to create the conditions for a free economy by limiting the scope of the state while restoring its authority and competence to act.[46]

The public sector was subjected to privatisation, marketisation and liberalisation.[47] "Embracing the market and the global economy entails that the role of the state is much more one of enabling or making possible certain economic conditions, rather than rigidly controlling and mandating the outcomes of policy."[48] State control, therefore, became what Hoggett calls "remote control",[49] or what Ball terms, "steering at a distance".[50] "The free enterprise solution", or "the new mixed economy"[51] was seen by Thatcher as a form of modernisation and a way out of the "crisis of the welfare state".[52]

Responsibility was shifted away from the state.[53] Parental choice was intended to emphasise the division of responsibilities. The White Paper in 1984, *Training for Jobs*, stated: "everyone concerned must have a clear understanding of what his or her own

responsibilities are and what part others are expected to play".[54] Employers should invest in their employees through training. Individuals should be ready to pay for some of the costs of training. In this White Paper, the idea of a loan system was introduced for those who had difficulty in financing their own training.[55]

The range of choice of schools – and their control – was broadened. The 1986 Education Act reformed the functions of governing bodies, which publicly maintained schools were required to have, removing "the in-built majority of allegedly self-serving LEA appointees and to increase the representation of parents and local business interests".[56] Also, new forms of state schools outside the control of the LEA, such as city technology colleges, were established.[57] As Brown indicates, the government's intention in founding the colleges was to develop "qualities of enterprise, self-reliance and responsibility, and secure the highest possible standards of achievement".[58] Through the expansion of various kinds of institutions, the government aimed to enhance the working of a core neo-liberal tenet: 'the free market'.

The 1988 Education Reform Act introduced drastic education reforms[a] as a part of the "new public management"; this was "a set of ideas for managing all institutions in the public sector and involved devices such as internal markets, contracting out, tendering

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[a] The reforms included the introduction of the National Curriculum, which specified programmes of study and attainment targets for the "core" and the "foundation" subjects. The Curriculum also introduced assessment and reporting procedures, which made possible the construction of "performance" league tables that encouraged schools to enhance achievement (Whitty, Power and Halpin, 1998, p.20). The examination system was reformed as well. The formal testing and assessment of pupils at the ages of 7, 11, 14 and 16 was introduced to help parents' choice of their child's school on the basis of "the necessary consumer information" (Brown, 1989, p.40). Both the implementation of league tables, and formal testing and assessment played a role in the improvement of accountability (Whitty, Power and Halpin, *op.cit.*), providing information to the public.

and financial incentives".[59] Existing public schools were allowed "to opt out of their LEAs after a parental ballot and run themselves as grant-maintained schools with direct funding from central government".[60] Another important aspect of the 1988 Act was open enrolment which had been introduced as parental choice in a previous Act. Open enrolment enabled schools to attract pupils outside their catchment areas.[61] This policy was, as Whitty, Power and Halpin point out, "a key feature of the Conservative government's attempt to create a quasi-market in which schools were expected to be more responsive to their clients or risk going to the wall".[62]

Thus, Thatcherite reform was based on the notion that 'education' was 'a commodity', and therefore: "Any fetter to the supply and demand for education should be removed" because "open competition between schools will raise standards for all and offer real choices to parents".[63] In other words, the privatisation and mareketisation of education was promoted on the basis of two conditions: firstly, "all parents should be free and able to move their children from one school to another if they so desire"; and secondly, "every school should have strong financial incentives to attract and to hold custom, and have sufficient reason to fear disaster if it fails".[64] The policies to increase parental control were, in Brown's expression, "the ideology of parentocracy", which involved "a major programme of educational reform and privatisation under the slogans of 'parental choice' and the 'free market'".[65]

Overall, the Thatcher government implemented an ideology in education heavily based on neo-liberalism.

In contrast, Japanese neo-liberalism [*shin jiyuu shugi*] in the 1980s was put into practice to a lesser extent. The ideology was understood as a means to reconstruct the economy

through liberalisation, rationalisation and innovations in technologies, together with the enhancement of the cohesion of the people, traditional culture and nationalism.[66] Neo-liberalism for Nakasone was, however, not only a means to change the role of the state, but also an answer to a search for the "identity for the state".[67] He aimed to use the education system to change "the ideologies of the Japanese people".

Nakasone himself was certain about the future direction for Japan and his role in shaping the direction of education, but he could not win over the majority amongst policy-makers and the public. As this section suggests, Nakasone's neo-liberal approach did not fully permeate educational policy-making during and after *Rinkyoushin*. This can be seen, as pointed out in Chapter Four, from the instability in the naming of the central policy of Nakasone's neo-liberal reform: what was originally 'liberalisation of education [*kyouiku jiyuuka*]',[a] meaning "free choice of public compulsory school" ended up as "an emphasis on individuality [*kosei juushi*]". To conclude that Nakasone's neo-liberal reform was a 'failure', as Schoppa and Thomas *et al* do, might be too extreme, but the evidence shows the hesitation and lack of momentum in the reform after Nakasone's resignation.

The extent to which Nakasone's neo-liberal ideas were put into practice was analysed by Schoppa. In 1991, he organised the results of Nakasone's reform initiatives in three categories. The first group was the initiatives which were "largely implemented or likely to be implemented", which included "moral education expansion and improvement", "the teaching of respectful attitudes towards the national flag and anthem", "a new 'University Council'" and "various internationalisation proposals". In the second group, "partially

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[a] Schoppa defines '*jiyuuka*' policies as those which aimed at introducing a "competitive mechanism" into the education system (1991, p.234).

implemented or too early to judge", there were "credit-system upper secondary schools", "curriculum 'flexibilization'"[a], "expensive expansion programmes" and the "probationary teacher-training year". According to Schoppa, however, more than half of the policies proposed by Nakasone were "totally stymied or likely to be stymied", and this was the third group: e.g. "*jiyuuka* (market competition) reforms", "textbook deregulation" and "university entrance examination 'flexibilization'".[b68] In short, as Schoppa summarises:

> The 6-3-3 system, the university entrance exams, the strict egalitarianism of the system and the Ministry of Education's regulatory control over virtually all aspects of school education – all targeted for 'radical' reform by the Prime Minister – remained essentially unchanged.[69]

Schoppa goes on to analyse the reasons for Nakasone's education reform being obstructed. First, during Nakasone's period in the 1980s, the consensus among political actors was limited. Second, conflict between Ministries made the reform difficult. The Ministry of Finance aimed to maintain control over the system and the budget of education, and the Ministry of International Trade and Industry wanted "a leaner, less-regulated and more economically-responsive education system". Third, there was also a conflict within the Ministry of Education: many officials preferred the status quo. Fourth, the teachers' union and teachers were successful in convincing the public of "the serious danger in Nakasone's proposals" based on neo-liberal principles.[70]

Overall, Taguchi has argued that the basis of the ideology was not solid enough to overcome the resistance of the opposition, and therefore, educational policies based on

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[a] Schoppa defines 'flexibilization [*juunanka*]' as policies which aimed at ending the uniformity of the content of Japanese education.
[b] Other stymied initiatives include: "six-year secondary schools", "gifted education reforms", "unification of kindergarten and nursery school administration", "university administrative reform", "switch to September school start" and "revision of the foreign language education".

neo-liberalism were not really developed after the termination of *Rinkyoushin*.[71] Thomas *et al* indicate that policy-makers could not reach an agreement, "which is crucial in Japanese tradition", to undertake neo-liberal reform.[72] Ichikawa considers that the limited scale of the Nakasone's education reform stems from the conditions in which *Rinkyoushin* was established – it was not possible to dislodge the Fundamental Law of Education. Hence, despite Nakasone's ambition for "large-scale reform to delve into the fundamentals of the education system" and his eagerness for 'liberalisation of education [*kyouiku jiyuuka*]', he could not alter the fundamentals, i.e. the purpose and the system of education, and administrative structure, and he could not make any drastic change to educational laws.[73] By the end of the 1990s, the emphasis on privatisation and marketisation was less visible in lifelong learning policy.

Comparatively, then, the penetration of neo-liberal philosophies at the level of educational action was different in the two countries. Thatcher put major neo-liberal policies, e.g. 'parental choice' and 'opting out', into educational practice, but Nakasone, in contrast, even had to downgrade his central policy, 'liberalisation of education'.

Thus, the translation of the ideology of neo-liberalism into policy practices in the two countries was quite different. These differences were compounded by subsequent shifts in political philosophy in the two places.

2) England's 'Advanced Liberalism'

In England, more than two decades have passed since the introduction of neo-liberal politics in England, and the current English form of neo-liberalism emphasises social inclusion and cohesion, and social mobility. This new form of neo-liberalism is what Edwards calls 'advanced liberalism', which explains, as this section indicates, New

Labour's political philosophy, the Third Way.

As analysed in Chapter Five, Labour since 1997, has been taking action to combat 'the learning divide'. The Third Way approach became a means of "a coherent and distinctive reconstruction of the state, civil society and welfare",[74] treating lifelong learning as an essential policy to educational and social reform. The Third Way, therefore, emphasises the 'dual commitment' through the promotion of lifelong learning: i.e. the emphasis on skills and knowledge for the purpose of economic growth and competitiveness, and the enhancement of accessibility to learning and the increase of learning opportunities to make the society inclusive and balanced.

As Edwards argues, such a dual approach of lifelong learning is a part of a range of techniques for "governing" in advanced liberalism. In developing lifelong learning, an aim is to foster more active, flexible and enterprising learners and workers.[75] As Edwards puts it: "Mobilizing lifelong learning and lifelong learners is intermeshed with the strategies through which the dispositions of active citizenship – free and self-reliant – are elicited."[76] Thus in Griffin's interpretation, the contemporary model of lifelong learning has become "post-welfare . . . with respect to globalism, technology and the market" with a social democratic approach.[77]

Advanced liberalism of New Labour is practised through the promotion of, for example,

'social capital'[a] and 'citizenship'.[b] There has been a demand to treat lifelong learning as a key component of the building of social value systems rather than simply as an economic instrument.[78] There are, in fact, initiatives implemented to promote citizenship. Particularly the 16 to 19 year olds are targeted for citizenship education, and it is identified as one of the six Key Skills.[c] "Citizenship Development" should be situated as "a Key Life Skill", and young people should gain the knowledge and skills of citizenship by becoming involved in voluntary and community activity.[79] The government sees that lifelong learning can contribute to enhancing "active citizenship" particularly amongst young people.[80]

Nevertheless, the focus of the UK government still concentrates on economic performance despite its recent tendency of treating the economic and the social as inseparable, putting terms such as social inclusion to the fore.[81] The government indeed explicitly claims that lifelong learning "lies at the heart of the Government's welfare reform programme".[82] However, as Mills argues, New Labour is keeping neo-liberal principles, but "with the now familiar New Labour twist",[83] i.e. social inclusion, cohesion or regeneration policies. The target has become "who is not participating" based on the

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[a] According to Schuller, social capital focuses on 'networks and relationships', assuming that "most things are seen through lenses of socially determined values and norms, measures which are input by the strength of mutual obligation and measures which are output in terms of social well-being (1998, p.19)". Locating social and human capital as complementary to each other, Schuller argues that social capital "can bring a much-needed extra dimension to both analytical discussion and political debate on the future of a learning society (*Ibid.*)".

[b] There is an argument that active citizenship and social capital have both positive and negative dimensions. Concerning about the relationship between lifelong learning, social capital and active citizenship, Mayo points out that as a result of emphasising "networks and relationships", only particular groups or individuals might be benefited, leaving the excluded as they were or marginalising them even more. In pursuing diversity in lifelong learning, competing definitions between lifelong learning, social capital and active citizenship cannot be avoided (2000).

[c] Key Skills are developed through the National Curriculum. They are "communication", "application of number", "information technology", "working with others", "improving own learning and performance" and "problem solving".

notion that "everyone has to participate in order to benefit society as a whole".[84] This "instrumental" approach which focuses on "non-learners" has developed together with economic incentives.[85]

Evans considers the Third Way approach more critically: "learning for living, the life sentence version".[86] The approach is, according to Rees *et al*, "an unwarranted abstraction of economic processes from the wider social system".[87] The Third Way treats lifelong learning – continuous skilling – as a means of actualising "the new contracting state" – which has "the new mixed economy of semi-privatised state and state-subsidised private sectors" – and full employment.[88] "In 'a learning society', no one would ever be unemployed – people would be 'learning'."[89] In Jarvis' vocabulary, lifelong learning is rather, "work-life learning":[90] "in this information society, lifelong learning has become something that affects all, or nearly all".[91] Halliday also argues that "skill talk" of the 1990s – which coheres with the conversation of globalisation – treats lifelong learning as a kind of investment that is subject to cost benefit analysis in a similar way to any other kind of investment.[92]

Advanced liberalism can thus be seen as, borrowing Ainley's expression, "the new state formation", which gives answers to "the crisis of control and legitimacy posed for it by permanent and structural insecurity of employment".[93] According to this perspective, lifelong learning can be seen as 'social control', and indeed, as Coffield puts it even more harshly: "the latest form of social control".[94] Borg and Mayo similarly stress that lifelong learning has "a humanistic facade"; behind the facade, there are individualisation; competition and "production-consumption nexus".[95] In other words, lifelong learning is absorbed in advanced liberalism as much as it was in neo-liberalism.

This is indeed a sharp criticism which highlights problems of the new forms of legitimacy of state action in advanced capitalist societies. The criticism is not 'proven' – but it suggests a continuing research theme for future work. However, it is also important to note – in a comparative study – that there is no inevitability about the continued direction of this political project. In Japan, the ideology of neo-liberalism has changed in a different way.

3) Japan's 'Quasi-communitarianism'

As discussed above, only a limited number of *Rinkyoushin*'s neo-liberal policies were implemented, for various reasons. Additionally, the neo-liberal approach to lifelong learning itself was often attacked. It was argued that despite its fundamental aim as a solution of *gakureki shakai* [a credential society], lifelong learning policy could lead to the reproduction of educational gaps through the merchandising of lifelong learning activities, free choice for individuals, the diminishing of social education provision, devolution and deregulation.[96]

In Japan, against this background of the rejection of neo-liberal reform, the departure from neo-liberalism was more explicit as compared with England.

This section suggests that although the Japanese government uses many of the themes from the international discourse of lifelong learning, what can be found in Japanese lifelong learning policy is 'quasi-communitarianism'.

In Japan, there are doubts as to whether a state operating under the ideology of marketisation and privatisation can deal with the complex and diverse agendas of society. In the case of Japan, the third sector, "the citizens' sector",[97] is expected to be a major

actor in the reform of society, bringing in the citizens' own perspectives to the reform. The state itself has to redefine its role in relation to the citizens' new role, and the NPO Law is one of the means of doing this.[98] And, the third sector has to be responsive to the field of education and lifelong learning. Voluntary activities are regarded as a means and an end: i.e. both a learning process and at the same time, as a place where learning results are used. Volunteers and members of NPOs help organise school's Integrated Study and weekend and after-school activities for local pupils. Training courses for volunteers and coordinators to promote and support lifelong learning are implemented as lifelong learning initiatives. At the same time, at school, pupils are encouraged to take part in volunteer activities.

This recent tendency is what Satou terms "the recurrence of the public dimension [*koukyousei no kaiki*]": i.e. a shift from neo-liberal lifelong learning policy which addressed the provision of educational services stressing the fulfilment of different learning needs to the focus on voluntary participation in educational and community activities as a form of volunteer groups and NPOs.[99] Similarly, in Matsuoka's vocabulary, the recent movement is a transition from an ideology of individualism to one of "groupism": i.e. lifelong learning used to be understood as a form of self-actualisation, but after the Hanshin/Awaji Earthquake, community building became the central feature.[100]

These movements and perceptions, developed in the 1990s, suggest that in Japan, the current policies of lifelong learning and education reform are indeed a form of 'communitarianism'. The term as used by Etzioni[101] refers to "a reaffirmation of community values" or "the restoration of civic virtues": i.e. "cultural traditions", "shared social understandings", "the network of social environments", "moral education in schools" and "democratic self-government".[102] "A communitarian perspective recognises

both individual human dignity and the social dimension of human existence."[103] As Etzioni puts it: communitarianism seeks "to make government more representative, more participatory, and more responsive to all members of the community", "to find ways to accord citizens more information, and more say" and "to curb the role of private money, special interests, and corruption in government". Communitarianism asks how "corporations, labor unions, or voluntary associations" can be "more responsive to their members and to the needs of the community".[104]

A community, in return, has to be responsive as well. Etzioni argues:

> a community . . . will have to develop moral values which meet the following criteria: they must be non-discriminatory and applied equally to all members; they must be generalizable, justified in terms that are accessible and understandable: e.g. instead of claims based upon individual or group desires, citizens would draw on a common definition of justices; and, they must incorporate the full range of legitimate needs and values rather than focusing on any one category, be it individualism, autonomy, interpersonal caring , or social justice.[105]

Such "moral values" should, first, be developed at home where "new generation requires moral anchoring", providing "not only material necessities, but also moral education and character formation";[106] and second, it is "strongly urged" that educational institutions are involved in providing moral education.[107]

This concept of 'communitarianism' does seem to explain a large part of the recent policy development of lifelong learning and education reform in Japan: the pursuit of a cohesive and active society, the bonding of a community, the emphasis on moral education and the importance of family learning. Some convincing evidence comes from a survey on the local planning of the promotion of lifelong learning; in both prefectural and municipal governments' ongoing schemes, the themes such as volunteer activities, community building, social participation and 'the fusion of schools and society' dominate.[108] More

concretely, the examples of the local practice in Yashio City and Osaka City illustrate the emphasis on these themes. In Yashio, "community building through lifelong learning [*shougai gakushuu ni yoru machizukuri*]" is proposed. The phrase means the building of the city with citizens' actions and involvement, putting together individuals' active participations and enthusiasm. Lifelong learning is positioned as the integration of all kinds of citizens' everyday activities such as working and studying. It is citizens who play a leading role.[109] Osaka City treats 'lifelong learning' with a narrower meaning, but the focus on civic participation is the same. Lifelong learning refers to: voluntary learning activities at any stage or setting of life for the purpose of self-enrichment and living a fulfilled life on the basis of the idea of respect towards others, e.g. fundamental human rights, freedom, democracy.[110]

As MEXT officials, Okamoto and Kameoka, indicate, this shift in the practice of lifelong learning is promoted by MEXT.[111] MEXT's role is not to get involved in structuring the administration of lifelong learning at the prefectural and municipal levels, but to organise a lifelong learning system and to support prefectures and municipalities. The role of individual prefectures and municipalities is to find their own way of putting lifelong learning into action.[112] The democratic procedure of localised policy-making to determine the scope and range of public benefits [*kouekisei*] from the viewpoint of "where to spend tax" is emphasised.[113] One can see in this emphasis the Japanese use of the adaptability of lifelong learning as a means towards facilitating local needs.

It can therefore be argued that Japanese lifelong learning policy and education reform policy is designed to contribute to the building of a communitarian society. However, as analysed in Chapter Six, Japan is inexperienced in civic participation and that is an obstacle to the building of a communitarian society. In this light, the Japanese approach

to lifelong learning and education reform is perhaps better described as the pursuit of 'quasi-communitarianism': i.e. a communitarian aspiration in a culture without a mature civic participation.[a]

Overall, then, after neo-liberal approaches which had emerged in the 1980s, both the UK and the Japanese governments have redirected their positions with a redefined version of 'lifelong learning' as a solution to societal problems. Lifelong learning has been positioned as a new paradigm for social reconstruction, rather than a mere reform of the education system. The current progress is as a result of each government's retranslation of 'lifelong learning': the advanced liberalism of the UK government and the quasi-communitarianism of the Japanese government. The adaptability of lifelong learning as a policy is noteworthy.

6. Summary

It is the particular flexibility of lifelong learning that offers an explanation to the research question of this chapter:

What is the relationship between the international discourse of lifelong learning and domestic lifelong learning policies in England and Japan?

First, there is a strong overlap between the international discourse of lifelong learning and

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[a] It should be noted that before the 1990s, Japanese society had often been identified as a society which had a strong sense of "groups", "belongings" or "communitarian values" (Vogel, 1979, pp.51-52). Harmony and co-operation, and the habits of negotiation and discussions were important in Japanese society (Wray, 1999, p.47). What had led Japan to economic success was not "a carefully enunciated ideology", but communitarian values, in which agreement of all participants in decision-making was emphasised (Vogel, *op.cit.*, p.129). Nevertheless, quasi-communitarianism since the 1990s differs from the earlier notion of groups, belongings or communitarian values. These notions only concerned harmony and co-operation within an institution, neglecting the world outside; whereas quasi-communitarianism addresses the integration of different groups and communities, which aims social development through social solidarity (Muro, 1995, p.5).

political discourses in England and Japan. The same debates about 'global change' and 'social justice' can be found in UK and Japanese official documents. Both governments used the international discourse, as a legitimator to persuade citizens of the benefits of lifelong learning. The international discourse was a contributor to the justification of the governments' adoption of lifelong learning as a public policy.

Second, the exceptional adaptability of the international discourse of lifelong learning enabled the treatment of lifelong learning to be retranslated. Originally in both England and Japan, lifelong learning was introduced as education reform policy, justified by neo-liberal principles. As those principles changed (into advanced liberalism and quasi-communitarianism) both governments relocated lifelong learning to address social concerns, and in principle to reconstruct society with a future vision of society which integrates both economic and social ends.

ENDNOTES

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CONCLUSION TO PART THREE: THE INTERNATIONAL-LOCAL RELATIONSHIP

Part Three has examined the relationship between the international discourse of lifelong learning and the English and Japanese lifelong learning policies.

Lifelong learning, as an ideology, has been constructed and legitimated through the discourses produced by international agencies, local governments and academics. Lifelong learning is made legitimate on two principles. It is offered as first, 'a universal solution' to the problems and opportunities of globalisation and the other urgent changes that the world is facing and second, as a means to bring social justice, enabling widening of life chances without discrimination on the basis of age, gender or class. As Field puts it, lifelong learning has an "overwhelmingly positive image".[1] A learning society or a lifelong learning system is 'an imagined future' – currently being constructed.

Nevertheless, within this pursuit of an imagined future, governments are able to reduce public resources spent on education, training and learning while stressing the promotion of individual responsibility or civic participation. Lifelong learning emphasises what Evans calls, "do-it-yourself politics",[2] the message of which is that "you are the author of your own life story".[3] As Field argues, individuals are required to acquire skills and knowledge, taking "active responsibility for their own well-being".[4] "Self-direction"[5] is stressed since everybody is expected to have a "stake" in society.[6] The emphasis on 'global change' and 'social justice' also produces a reform agenda that stresses individuals' and employers' responsibility for the development of human capital.

Thus, lifelong learning permits some surprisingly different emphases in policies, within the common legitimator of the arguments of 'global change' and 'social justice'. Both

internationally and domestically, the exceptional adaptability of lifelong learning permits a range of policy options and disguises particular interests. Governments take the advantage of this legitimacy and adaptability, translating the idea differently.

These translations of lifelong learning are made in domestic contexts which vary. A notable example of this has just been analysed. The broad philosophy of neo-liberalism in England and Japan was divergent in these two domestic contexts. In England, the neo-liberal project was virtually unstoppable in the period of the Conservative administrations of and after Thatcher. Lifelong learning was absorbed into a particular political context which located the idea as part of an economic agenda that emphasised marketisation and privatisation. In contrast, in Japan, older political assumptions about the need for 'agreement' resulted in the blocking of Nakasone's national restructuring project based on neo-liberalism. His education reform in which 'a shift from *gakureki shakai* [a credential society] to a lifelong learning society' was the central principle could not actualise many of its proposed initiatives.

Thus, as the domestic political philosophy changes, so does the focus of policy practice. This point can be seen clearly in later developments – in the shifts into advanced liberalism and quasi-communitarianism in the two countries.

Advanced liberalism is a sophisticated version of neo-liberalism, which is central to New Labour's Third Way – a means of social reform. Through the promotion of advanced liberalism, lifelong learning policy aims to foster more active, flexible and enterprising learners and workers, responding to globalism, technology and the market. The UK government aims to develop "professional labour markets"[7] that enhance employability.[8] As a consequence, in England, a large part of policy implementation of lifelong learning is

seen in the skills development of 'non-learners'. The public investment in these areas of the population is legitimate since by offering skills and knowledge, they will become inclusive in society, contributing to social cohesion as well as economic growth. The argument of the government is that society as a whole benefits.

Contemporary quasi-communitarianism in Japan emphasises that 'the citizens' sector', consisting of voluntary participants, is a major actor in the reform of society. Citizens are expected to bring their own perspectives to the reform. Initiatives are designed to enhance the collaboration between communities, schools and families and to raise awareness and participation of the public. Such policies intend to share responsibilities of 'the desolation of society' amongst all members of society and to involve them in reconstructing the country. The argument of the government is, again, that society as a whole benefits.

What can be seen from this analysis is that the governments' implementation strategies – involving employers and building an infrastructure at the policy formulation, and targeting 'non-learners' and promoting civic participation in the reformulation processes – have indeed addressed neo-liberalism, advanced liberalism and quasi-communitarianism, under the name of 'lifelong learning'.

Thus, lifelong learning has been capable of sustaining multiple translations through its construction as a legitimate and adaptable discourse as well as in its development as a policy. These translations are: a) from the international to local within the fluid relationship between the international and the local discourses; b) from neo-liberalism to advanced liberalism and quasi-communitarianism; and c) from a targeted educational reform policy to a broader project for the revitalisation of societies.

ENDNOTES

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CHAPTER EIGHT REFLECTIONS AND FUTURE SUGGESTIONS

This study has analysed the political and social shaping of two different lifelong learning policies in two countries and also the significance of the international discourse of lifelong learning.

This final chapter reflects on the study, summarising the answers to the nine research questions, and then proposes some future research themes which evolve from this study.

In conducting this study, approaches were carefully chosen to investigate the reasons for and the processes of the development of the differences in English and Japanese lifelong learning policies, although there were some limitations[a] to the work given problems of time and the consequences of the decisions actually taken.

The study started by posing the following nine research questions.

1. What are the major characteristics of lifelong learning policies in England and Japan?

2. What are the major characteristics of the international discourse of lifelong learning?

3. When and how were major lifelong learning policies formulated in England and Japan?

4. What were the strategies for the implementation of those policies in the two countries?

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[a] For example, the fieldwork could be extended by increasing the number of interviews to obtain more varied accounts of policy-makers' experiences and views in analysing the formulation and the reformulation of lifelong learning policies in the two countries. Fieldwork could also be undertaken at the level of cities and towns. The relationship between the lifelong learning discourse at the national level and the practice at the municipal level might have been opened up to understand patterns of diffusion of lifelong learning policy. In terms of the scope of lifelong learning policy, this study concentrated on the policy controlled by the education administration, but this is not clear-cut as the introduction chapter indicated, particularly in the case of England. Further investigation of lifelong learning policy across Departments or Ministries might construct a different interpretation of the administration of lifelong learning.

5. When and what were the watersheds in the development of lifelong learning policies in the countries?

6. How did lifelong learning policies change in the countries?

7. What were the strategies for the implementation of these changed lifelong learning policies in the countries?

8. What is the relationship between the international discourse of lifelong learning and domestic lifelong learning policies in the countries?

9. Why are lifelong learning policies different in the countries?

The answers to these questions are grouped into five themes according to their contents.

English and Japanese lifelong learning policies

The Table below summarises the lifelong learning policies in England and Japan:

Table 1: The differences of the approaches to lifelong learning policies

	England	**Japan**
societal problems	skills shortage, the learning divide	a credential society, the desolation of society
aims of lifelong learning	economic growth and competitiveness	societal bonding and community building
major policy focus	skills development programmes	volunteer activities

In England, the government has treated the weakness of basic and intermediate skills as problematic, and lifelong learning has been seen as a remediation for an economic problem. The government's approach in linking 'learning' directly to 'the economy' is a legacy from the previous Conservative government.

However, new concerns about social inclusion were raised by New Labour. In addition to the skills shortage, 'the learning divide' and exclusion were identified as problems. Since 1997, the Labour government has treated lifelong learning as an essential policy for social reform through the ideology of the Third Way. Thus, there has been a dual commitment. The emphasis on skills and knowledge for the purpose of economic growth and competitiveness remains unchanged; but at the same time, access to learning and an increase of learning opportunities to make society inclusive have been stressed. However, these social agendas are still indirectly linked to the economy. Inclusion policies aim to skill, upskill and reskill young people and adults to bring them back to the labour market. Hence, the priority of the government in lifelong learning policy remains economic, although their social concern has been increasingly stressed.

In Japan, in contrast, lifelong learning policy has not and does not emphasise an economic agenda. Originally, the idea of lifelong learning was adopted to deal with a long-lasting problem of the country; *gakureki shakai* [a credential society]. The policy slogan, 'a shift from *gakureki shakai* to a lifelong learning system', recurs in official government documents. To combat this societal problem, efforts were made to construct a more flexible and diversified education system.

Recently, the concept of 'communities' has become the basis of hope for policy improvement. The government has aimed at the expansion of learning opportunities and the enhancement of collaboration between schools, families and local communities. The government encourages the promotion and implementation of lifelong learning, in the community by the community. Greater and more voluntary involvement of local populations and the creation of stronger local bonds are seen as the key to reforming

school education and to making society a better place to live in. Social concern dominates current Japanese lifelong learning policy.

Both in England and Japan, lifelong learning has been positioned as central to ongoing education reform. But what the UK and the Japanese governments aim to achieve through the promotion and implementation of lifelong learning policy varies.

The proposition of this study has been that these differences were constructed within domestic as well as global contexts. The international discourse of lifelong learning has had a part to play in constructing these differences.

The international discourse of lifelong learning

That discourse can be characterised by two major arguments:

- the 'global change' argument; and
- the 'social justice' argument.

The international discourse of lifelong learning claims that lifelong learning enables people to cope with the rapid and dramatic changes in the economy, culture, technologies and demography which have largely been brought about by globalisation. For example, the OECD argues that adaptation and renewal are required in a world in which employment structures are shifting, ICT is diffused, skills needed for jobs are changing, populations are living longer, and new values are evolving.[1] UNESCO similarly stresses the need to cope with "rapid socio-economic and technological changes" brought about by globalisation and the development of ICT.[2]

The second characteristic of the international discourse is that it suggests lifelong

learning is able to bring 'social justice' through the practice of lifelong and lifewide learning for all. Lifelong learning will extend people's life chances, and enhance social inclusion and cohesion. UNESCO, for example, indicates that in response to "new challenges", 'learning throughout life' should be promoted within the whole society.[3] The four objectives of lifelong learning declared by the EC – "personal fulfilment", "active citizenship", "social inclusion" and "employability/adaptability"[4] – emphasise social justice themes more than economic ones. The EC also stresses a human theme in emphasising that the lifewide approach to formal, non-formal and informal learning should lead to "useful and enjoyable learning".[5]

Lifelong learning has thus become a discursive norm in which lifelong learning is, with the arguments of 'global change' and 'social justice', seen as 'a universal solution' to a range of difficulties and problems that the world is facing. The application of 'a universal solution' can be identified in both England and Japan, although lifelong learning was first attached to the particular deficiencies of the countries in the formulation of lifelong learning policy.

The formulation of lifelong learning policies

Similar patterns can be identified in the processes of the formulation of lifelong learning policies in England and Japan. These patterns were:

- a need for a remediation policy to tackle a long-lasting problem of society;
- strong political leadership with a clear political ideology; and
- an implementation strategy for lifelong learning policy.

Lifelong learning first entered into the policy domain as a remediation policy to tackle a particular long-lasting problem in the countries – skills shortage in England and *gakureki*

shakai in Japan. Both countries had financial difficulties. Both countries had strong political leadership with a clear ideology (neo-liberalism) which framed the formulation of lifelong learning policy by promoting market principles and by encouraging individual responsibility.

However, the strategies diverged. The UK government aimed to involve employers: e.g. the establishment of TECs. The Japanese strategy was the building of the infrastructure of a lifelong learning system: e.g. the enactment of the Lifelong Learning Promotion Act.

During this process of the formulation, lifelong learning functioned as a filter for neo-liberalism. For both the UK and the Japanese governments, lifelong learning was a convenient tool for the promotion and implementation of neo-liberal policies. As Chapter Seven argued, the initial translation therefore was similar.

The remediation policy, however, did not remain the same in either country. In England after 1997 and in Japan after the mid 1990s, lifelong learning policies have been reformulated, but the ways in which this happened differed.

The reformulation of lifelong learning policies

The reformulation processes in England and Japan were not the same as the pattern of the initial formulation, although there were certain common elements. They were:

- a watershed which triggered change in lifelong learning policy; and
- a rigorous implementation strategy of lifelong learning policy.

In England, the watershed was when New Labour came to power in 1997, recognising a need for a radical method to tackle skills shortage which had caused the learning divide.

In Japan, the watershed was the first half of the 1990s, and there have been its after-effects. Both the government and the public perceived that the country was facing a crisis, *shakai kouhai* [the desolation of society], because of *kyouiku kouhai* [the desolation of education], the collapse of the Bubble Economy and the damage by the Hanshin/Awaji Earthquake. Traditional values were doubted, and future directions became unclear. Both the UK and the Japanese governments perceived that the problems of skills shortage and *gakureki shakai* had not been solved despite the implementation of lifelong learning as a remediation policy.

In England, lifelong learning policy came to stress the social principles of inclusion, cohesion and regeneration. In the English case, the formulation and the reformulation of the policy had a similar pattern. Policy change was the combination of a political ideology, the Third Way, which treated lifelong learning as an important component, and clear political leadership including the work of the Secretary of State, Blunkett, who believed in the idea of 'learning throughout life'. The improved economic situation which occurred at the beginning of the Labour administration permitted extra spending on social agendas.

In Japan, lifelong learning policy came to focus on community building and school reform in which morality and traditional values were emphasised. The link between schools, families and communities has been treated as pivotal. At the same time, the expansion of the interest and participation of NPOs and volunteering, which was the positive spin-off of an economic recession and a natural disaster, has contributed to the reshaping of lifelong learning policy.

The change to lifelong learning policy has been, however, affected by particular aspects of society in both England and Japan.

In England, one of these aspects is the obsession with an audit culture, which is strongly related to the powerful Treasury and the simple correlation between high-skilled workforces and economic performance. The other aspect is social class. The Labour government has committed itself to develop a cohesive society in which the disadvantaged population is included.

In Japan, both the government and the public have hoped that a civil society can be strengthened through the practice of lifelong learning. However, this project has been obstructed by societal characteristics such as inexperience in civic processes, strong emphasis on spiritual principles, and the strong link between the education system and the employment system. As a result, the discussion on accountability has been difficult, and the emphasis on university degrees still remains.

When the UK and the Japanese governments faced the difficult moments of 'the learning divide' and 'the desolation of society', they both strategically reemphasised the promotion of lifelong learning. The strategy of the Labour government has been to target 'non-learners' for the effective implementation of lifelong learning policy which addresses social inclusion. The Japanese government's strategy for the reshaped lifelong learning policy which focuses on community building has been to promote public involvement, such as volunteer activities.

What has been common to both governments' actions is that the recent strategies are more coherent and detailed than the earlier strategies – and involve a wider range of social actors such as the involvement of employers and the setting up of a complex infrastructure for community construction.

Thus, many of the differences between English and Japanese lifelong learning policies derived from these divergent reformulation processes. After the initial formulation in which neo-liberal principles were emphasised, the policies were domesticated as a reflection of different political aspirations and different watersheds. This is what Chapter Seven called 'retranslations'. However, the domestic translations differed considerably.

The changing relationship between the international and the local discourses

For example, at the policy level, two shifts are occurring at about the same time: a) there are practical shifts in lifelong learning policy; and b) in the new contexts, there is a shift in the framing of political philosophy.

- England moved to 'advanced liberalism'; and
- Japan, to 'quasi-communitarianism'.

In England, the Labour government has continued to take a neo-liberal approach but with additional principles of social cohesion, inclusion and regeneration. With this new ideology, 'advanced liberalism', quite a few initiatives have been implemented to promote those new concerns, but the fundamentals of neo-liberalism, i.e. market principles and individual responsibility, have been kept unchanged.

In Japan, neo-liberalism, which was the ideology when lifelong learning policy was formulated at the end of 1980s, came to be less stressed in the 1990s. The ideology shifted to 'quasi-communitarianism', aiming at community development through civic awareness and contribution but without an element of 'democratic self-government'.

What has enabled this shift from a common version of neo-liberalism to different

emphases is the exceptional legitimacy and flexibility of lifelong learning which permits varied translations based on different purposes as defined by governments. Here, one of the important influences is the extreme generality of the international discourse on lifelong learning: it is open to local translations.

This is what Chapter Seven called the 'fluid' relationship between the international and the local discourses of lifelong learning. The original common translation of lifelong learning as neo-liberal policy has been the indigenised within advanced liberalism and quasi-communitarianism. Lifelong learning permits markedly different versions.

This theme of the changing international-local relationships should be explored in future research. The concepts of 'translation' and 'retranslation', and probable additional concepts such as 'indigenisation' and 'reindigenisation' can be developed theoretically. And then, this interpretative framework can be tested against other countries' lifelong learning policies: Where are other 'contemporary traditions' of lifelong learning shifting quickly and what are the modes of 'translation' as against the international discourse?

On the same theme of the phenomenon of the diffusion of lifelong learning, it was explained in the introduction chapter that this study was not about 'transfer'. However, this theme could now be developed, looking into international-local relationships in terms of the 'interplay' of international and local politics. Here the opinions of the relevant social actors would be very important, and interviewing of experts could be undertaken, but on a larger scale than was done in this study.

There is one more proposal, which is to trace the roots of the historical problems of

England and Japan. If lifelong learning policy is a solution to national problems, one possible research area is to probe the sources of the problems. This will then allow for the construction of policies based on 'evidence'.

This study has shown that the current circumstances of lifelong learning in England and Japan are extremely politicised. Of course, all public policies are politicised, but the unique adaptability of lifelong learning makes politicisation easier. Lifelong learning carries the danger that it will shift political and public attention from the fundamental societal problems of class or civic participation.

Further, the current national reconstruction projects – the elimination of 'the learning divide' for social inclusion and cohesion in England and the recovery from 'the desolation of society' in Japan – are too complex to be solved through the promotion and implementation of lifelong learning alone. In both societies, these issues involve other deeply embedded characteristics. Lifelong learning can contribute to easing the societal problems of 'skills shortage' and '*gakureki shakai*'. But, it should not be a substitute for treating these issues directly. It should no longer be seen as 'a universal solution'.

If the UK and the Japanese government do not alter their approach to the development of lifelong learning, they risk improving neither the remediation of long-standing problems nor the achievement of 'a learning society' or 'learning culture'. Lifelong learning needs its own position as a public policy so that it can genuinely deal with the realisation of the provision of learning opportunities throughout life.

The further difficulty that the governments have with lifelong learning is its public nature. Recently, there has been criticism that the governments are compelling the public to participate in lifelong learning: e.g. the UK government forces 'non-learners' to start learning; and the Japanese government has made volunteer activities compulsory at school. The governments need to resolve this conflict between the voluntary nature of 'learning' and the public responsibility of lifelong learning 'policy' if they continue to have it.

Answers should be sought to questions such as: What is the role of the government in the development of lifelong learning? Where should public resources be spent? What are its public benefits of lifelong learning? What are considered to be lifelong learning activities? The governments have not yet fully clarified these fundamentals, and there are dilemmas such as the compulsion element of lifelong learning.

In pursuing these challenges, I would suggest that the UK and the Japanese governments should develop a systematic 'cross-cutting' structure for the administration involved in the development of lifelong learning policy.

Both the UK and the Japanese governments claim that their organisational structures are 'cross-cutting'. However, as a couple of interviewees of this study pointed out, collaboration amongst different Departments or Ministries is still limited. In the case of Japan in particular, there is a strict administrative boundary between 'education' – administered by MEXT – and 'training' – administered by MHLW. Furthermore, within MEXT, the policy-making of compulsory education and lifelong learning has not yet been

integrated. If both governments are serious about social reform using lifelong learning, a leading unit of the promotion and implementation of lifelong learning which is able to administer across Departments or Ministers should be set up within a government.

If the UK and the Japanese governments do not take these agendas seriously, sooner or later, 'lifelong learning' risks dissolving into empty rhetoric. In fact, this might be already happening. I remember a crude comment made by one of the interviewees: "Once an idea became a policy, it is very difficult to get rid of it."

Both England and Japan should learn from a common old saying, "if you run after two hares, you will catch neither [*nito o ou mono wa itto o mo ezu*]".

ENDNOTES

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[1] OECD, *Lifelong Learning for All* (Paris: OECD Publications, 1996), p.16.
[2] UIE, *Integrating Lifelong Learning Perspectives* [http://www.unesco.org/education/uie/pdf/uiestud36.pdf] (2002), p.xi.
[3] UNESCO, *Education for All, The Amman Affirmation* [http://www.unesco.org/education/efa/ed_for_all/background/amman_affirmation.shtml] (2001), page unknown.
[4] CEC, *Making a European Area of Lifelong Learning a Reality: Communication from the Commission* [http://www.kath.de/kbe/international/europabuero/Mitteilung-LLL-en.pdf] (2001), p.9.
[5] *Ibid*.

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APPENDIX INTERVIEWS

The interviews in this study are supplementary to the documentary analysis, and therefore, are not the major method for data collection, and are not central to the thesis.

The purpose of the interviews is firstly, to obtain up-to-date information of the development of lifelong learning policy. Policy is not immutable, therefore, a way to bridge the gap between things said in publications and what is happening at present is required. The solution here is interviews. Secondly, because this study is about the interpretation of two societies, interviews are chosen to understand the underpinning aim of lifelong learning policy behind the ideology. Such information is not available from documents and has to be obtained directly from those who have been involved in the development of the policy. Thirdly, the method has to be qualitative, not quantitative, since the data wanted is about the perceptions of the specialists of lifelong learning: e.g. policy-makers and academics. Fourthly, their perceptions can add extra flavour to the study.

However, the general principles of good interviewing were followed, as specified by a number of classic texts.[a]

The type of interviews used is the Expert Interview, which enables the acquisition of experts' views and knowledge on lifelong learning. Experts chosen are in a position to be able to give the specialised information about the content of the current lifelong learning

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[a] Jennifer Mason, *Qualitative Researching* (London: SAGE Publications, 1996); Uwe Flick, An Introduction to Qualitative Research (London: SAGE Publications, 1998); British Educational Research Association, *Ethical Guidelines* [http://www.bera.ac.uk/guidelines.html] (2000); Richard Pring, *Philosophy of Educational Research* (London: Continuum, 2000); Gajendra K. Verma and Kanka Mallick, *Researching Education: Perspectives and Techniques* (London: Falmer Press, 1999).

policy, the content of policy documents related to lifelong learning, the latest practice and discussions of the lifelong learning policy, the history of the development of lifelong learning and the political, economic and social contexts of the development of lifelong learning. Experts should be from different institutions to collect a range of viewpoints: policy-makers within and outside DfES or MEXT; academics who have different positions towards lifelong learning; and local civil servants who are involved in the development of lifelong learning.

The purpose of the interviews is to supplement the document analysis; therefore, the important criterion of the choice of the interviewees is the balance of the experts, whose institutions are relevant to lifelong learning development and whose institutional locations guarantee their knowledge about lifelong learning.

There are six categories in the institutional locations of interviewees: first, policy-makers of the section of lifelong learning within education administration (in England, two from the Lifelong Learning Directorate, DfES, and in Japan, one from the Lifelong Learning Policy Bureau, MEXT, and the other who had just been transferred to other section); second, retired civil servants or academics who were involved in the earlier stage of the policy-making of lifelong learning (in England, two, and in Japan, one); third, a policy-maker or researcher from a quango (in England, one from LSC, and in Japan, one from NIER); fourth, an academic who was a member of an advisory council concerning lifelong learning (in England, NAGCELL, and in Japan, the Lifelong Learning Council); fifth, academics (in England, two, and in Japan, four); and sixth, local civil servants who are involved in the development of lifelong learning (in England, one, in Japan two). The

total number of the interviews conducted was in England, nine,[a] and in Japan, eleven.[b]

The kinds of questions asked in this study are as follows:

1. Principles and practice of lifelong learning

1) In your view, what are the characteristics of lifelong learning in England/Japan?

2) Do you think that 'lifelong learning' is rhetoric?

2. Changes and priorities of lifelong learning policy

1) When do you think that the significant change of the development of lifelong learning policy occurred in England/Japan?

2) What do you think was the prioritised agenda of the lifelong learning policy at that time?

3) Do you think that the prioritised agenda have changed since then?

3. Drivers of lifelong learning policy

1) What is your opinion on the reasons why lifelong learning has been emphasised and has taken shape as 'policy' since the late 1990s?

2) What is your opinion on the reasons why lifelong learning had not been taken into the education policy domain until then?

The interviews are used in the main text in the following ways. First, the data is analysed manually: the response of the interviewees is categorised according to the themes and summarised under headings, and then, cross-reference is made with documentary sources. The commentaries made by the interviewees are quoted as an illustration or an anecdote. With the permission of the interviewees, their names and titles are quoted.

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[a] One interview was done via email due to the difficulty in travelling.
[b] The number became larger in Japan because one interviewee introduced me to two more interviewees who had not been listed originally.